



**EMBRACE RETIREMENT WORKSHOP**

**Big Question...Now What?:** Transition and Create a Retirement Identity.

**Step 1 – Transition:** Take Time - Study your Situation – Create a New Identity

**Study Your Situation:**— Examine 7 Components – Make a Plan - Develop Doable Goals

**3 Conditions:** Change – Passion – Doors Opening

**Find Your Passions:** Old – Rediscover – New

**Doable Goals:** Affordable – Timely

**Tools:** Structure – Support Teams – Reflection

**Retirement Focus:** Work – Finances – Living Arrangements – Relationships – Health & Fitness – Hobbies & Activities – Events & Social Networks

**Work:** Stay Mentally Active – Have Fun – Make Differences

**Finances:** Build a Team – Mindful How to Save and Make Income.

**Living Arrangements:** Stay Put or Change

**Relationships:** Men & Women Want Different Things – Defining and Creating Relationships

**Health and Fitness:** Create a Health and Fitness Plan

**Hobbies & Activities:** Fun and Making Differences – Doable Bucket List

**Events & Social Networks:** What Events Do You Do? – How are You Networking?

**Retirement Plan:** Identify the Issues – Implement a Plan - Evaluate

**NOTES**

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## Summary Exercise - Embrace Retirement incorporating the 7 Components

A. Choose a component to work on.

- **WORK**  
Explore different work opportunities that you would consider fun or ones that would make a difference.
- **FINANCES**  
Create a way to increase your financial assets or to reduce your expenses.
- **LIVING ARRANGEMENTS**  
Explore different living arrangements and identify why they are worth considering.
- **RELATIONSHIPS**  
Develop a shared plan with your partner.
- **HEALTH & FITNESS**  
Create a healthy diet/fitness plan.
- **HOBBIES & ACTIVITIES**  
Choose a doable activity from your bucket list and create a plan.
- **EVENTS & SOCIAL NETWORKS**  
Create a fun family or friend event.

B. Develop a plan that includes:

Goals

Resources

Timeframe

Baby Steps

C. Will your anticipated results include having fun, making a difference and/or sharing and caring with family or friends?