

The Next Chapter: Lifestyle & Purpose Worksheet

Retirement Reflection & Planning

Congratulations on reaching this exciting new phase of life! Retirement is about more than just finances—it's about creating a fulfilling and meaningful next chapter. Use this worksheet to reflect on your goals, interests, and plans for retirement.

1. Identifying Your Passions & Interests

List 3–5 activities or hobbies that bring you joy or that you've always wanted to explore:

1. _____
2. _____
3. _____
4. _____
5. _____

2. Learning & Personal Growth

What skills, knowledge, or subjects would you like to continue learning about or improving?

- _____
- _____
- _____

Would you consider taking online courses, attending workshops, or joining a club? Circle one:
Yes / No / Maybe

3. Social Connections

List the key people (friends, family, colleagues) you want to stay connected with:

How do you plan to maintain and strengthen these relationships? (e.g., weekly calls, regular meetups, trips together)

4. *Giving Back & Community Involvement*

Are there volunteer opportunities or organizations you'd like to be involved with? If so, list them below:

- ---
- ---
- ---

How much time per week/month would you like to dedicate to volunteering?

5. *Travel & Adventure*

What are some destinations you'd love to visit in retirement? (Local, domestic, international)

- ---
- ---
- ---
- ---
- ---

Do you prefer solo travel, group trips, or family vacations? (Circle one)

6. Creating a Daily Routine

How would you ideally like to structure your days in retirement? Consider a balance of relaxation, hobbies, social time, and physical activity.

7. Health & Wellness Goals

What activities will you do to stay physically active? (e.g., walking, yoga, swimming)

What will you do to maintain mental well-being? (e.g., meditation, journaling, therapy, joining a social group)

8. Personal Legacy & Achievements

What are some meaningful goals you'd like to accomplish in this phase of life?

Do you have any traditions or wisdom you'd like to pass down to future generations?

Final Thoughts

What does a fulfilling retirement look like for you in one sentence?

Take time to revisit this worksheet periodically as your interests and priorities evolve. Retirement is a journey—enjoy the adventure!
