

PLANNING FOR LIFE WHILE WORKING

Please answer the following questions.

WORK-LIFE BALANCE

Energy Management Techniques

What are three strategies you can implement to better manage your time?

What are three activities you need to do to give you more energy or sustain your energy at a high level?

Identify one activity per week that you will delegate or eliminate to free up personal time.

Stress Reduction and Mindfulness

List two daily or weekly activities that will help you reduce stress.

How often and when can you commit to regular mindfulness or meditation practice?

Vacations and Downtime

Plan your next three vacations. Where will you go? What will you do? Who will you be with?

Plan your next three long weekends? Where will you go? What will you do? Who will you be with?

How will you ensure you truly disconnect from work during your downtime?

FINANCIAL PLANNING

Budgeting for Leisure Expenses

How much of your income is currently allocated to personal and leisure activities?

Set a monthly personal budget for each activity.

HEALTH MANAGEMENT

Regular Health Check-ups

When was your last comprehensive health check-up?

Schedule your next one and list the health metrics you want to track.

Exercise Routine

Describe your current exercise routine. What can you improve?

List three new physical activities you want to try.

Eating Plan

Evaluate your current eating habits. What changes can you make for better health?

Plan a week's menu that includes nutritious and balanced meals.

PERSONAL DEVELOPMENT

Learning and Skills

What new skill or knowledge area are you interested in pursuing?

Identify resources or courses that can help you learn this skill.

Hobbies and Interests

List three hobbies or interests you currently have or want to develop.

Schedule regular time slots in the week for these activities.

Personal Relationships

How often do you connect with friends and family?

For each person you want to spend time with, set goals on how much time and what you want to do with each one.

Charitable Giving

What causes are important to you?

Plan how you will support these causes, financially or through volunteering.

VISION FOR RETIREMENT

Defining Fulfillment

What does a fulfilling retirement look like to you?

List activities and goals that you are passionate about for your retirement.

HEALTH AND WELLBEING

Health Care Planning

What are your plans for health care in retirement?

Investigate long-term care insurance and decide if it's right for you.

Adjusting Health Routines

How will you adapt your exercise routine as you age?

How do you plan to stay active and healthy in retirement?

SOCIAL ENGAGEMENT

Maintaining Connections

How will you stay connected with friends and professional colleagues in retirement?

What regular social activities do you plan to do?

What clubs or groups do you plan to join?

Mentoring and Consulting

Would you be interested in mentoring younger professionals or consulting in your industry?

Outline how you could offer your expertise in a flexible, rewarding manner.

PSYCHOLOGICAL ADJUSTMENT

Coping with Identity Shift

How do you foresee your identity changing once you retire?

What are ways you can remain connected to your sense of purpose?

Mental Engagement

What intellectually stimulating activities are you planning to pursue?

How do you plan to engage in regular learning or cognitive challenges?

What are three insights you have from completing this exercise?

What three specific actions do you plan to take as a result of completing this exercise?