

We have been studying, practicing, and interviewing people about retirement for nearly two decades. In 2010, this interest led to the vision for and the writing and publishing of *Your Retirement Quest*. Since then, we have touched thousands of prospective and current retirees with their books, workshops, videos, and other resources.

The premise is simple, yet profound:

- Most of the 10,000 Baby Boomers who retire every day are excited yet a bit anxious about retirement, as well as being unaware of the challenges they may face and the opportunities they may have in their future.
- Most who plan for this phase of life focus solely on their finances—important, but only one of the 10 key elements of a fulfilling retirement.
- Having a holistic, written life plan greatly increases the odds of having the future these Boomers deserve. And having this life plan also improves their financial plan.

*Your Retirement Quest* is unique, in that, through the book, workshops, and other resources available to Boomers.

1. We bring all of the relevant knowledge about retirement life planning together in one place.
2. We describe the challenges, opportunities, and 5 myths that may affect Boomers' futures.
3. We provide a practical and holistic approach to retirement planning and to critical retirement decision making to enable Boomers to turn their new-found knowledge into action.
4. We introduce the concepts of “practicing retirement” and “crucial conversations” to help Boomers prepare for this major life transition, while enhancing their lives at the same time.

We partner with Financial Firms who want to differentiate themselves in the market place and who understand the value of helping their prospective and current clients with their retirement life planning as well as their financial planning. We also partner with Companies that value their experienced employees and understand it is to both the company's and employee's benefit for the employee to end their career on a high and transition smoothly into retirement.

Contact us to learn more about how *Your Retirement Quest* can help you live a fulfilling retirement and how your Financial Advisors can support clients and your Company support experienced employees.

## **Book Synopsis—*Your Retirement Quest***

Every day, 10,000 Baby Boomers are retiring in the United States. Some are being thrust unexpectedly into retirement due to downsizing, while many others are choosing to pursue the next phase in their lives. At the same time, many Boomers are delaying retirement because of their uncertainty about the future.

Most prospective retirees are unprepared for the significance and implications of this change, often leading to serious disappointment after the initial honeymoon stage of retirement. For those that do think of the future, most focus only on having their finances in shape and anticipating “the last day” of work. They don't realize that financial security is but one of the important factors to living a fantastic retirement. As a result, a large number of retirees have difficulty when they could be experiencing the best years of their lives.

*Your Retirement Quest* brings together in one place all the essential elements that are critical to living an extraordinary life. The book also provides a simple, practical approach to turn new-found knowledge into choices and actions to help replace anxiety with clarity, certainty, and freedom. *Your Retirement Quest* is based on an exhaustive study of literature and research, on interviews with a diverse group of over 200 retirees, many whose personal stories appear in the book, and on the personal experiences of the authors. The book, therefore, presents a holistic framework that dispels many of the current myths of what a great retirement can be and reveals the 10 Secrets for Creating and Living a Fulfilling Retirement. Through the book, readers will discover the 10 Secrets and:

- Understand the five stages of the retirement journey
- Envision what retirement really can mean to them
- Learn about the ten key elements to a fulfilling retirement
- Understand the value of “practicing retirement”
- Develop a personal plan that is right for them and build the skill, will, and support to “do it”
- Learn how to renew their plan as life circumstances change throughout their retirement years
- Engage in personal stories of successful retirees ranging from Helen Young, a single mother of five and part time librarian to distinguished business leaders such as John Pepper, former CEO of Procter & Gamble and current Chairman of the Board of the Walt Disney Company.

*“The ideas in Your Retirement Quest are simple, but magical; the cases are compelling and personal; the exercises are insightful and useful.”*

**-Dave Ulrich:** Professor-Ross School of Business, University of Michigan

*“The authors strike an unusual Golden Mean: they help readers engage in deep self-reflection on the core questions of life and also provide the practical tools for fulfillment.”*

**-Laura Nash, PhD:** Former Senior Lecturer, Harvard Business School

*“Your Retirement Quest provides a rich roadmap to making your retirement healthy, happy, intellectually stimulating, and meaningful.”*

**-Tony Schwartz:** Founder and President of The Energy Project

*“This book promises new beginnings; don't leave home without it!”*

**-Doug Matthews:** President and Chief Operating Officer, Right Management