

Once you assess your current situation, you can convert that knowledge into a written holistic retirement life plan.

A “holistic” plan is one that brings all of the 10 key elements of a fulfilling retirement into your life, thereby increasing the odds you will have a successful retirement.

Having a “written” plan, versus just having it in your head, makes it five times more likely you will actually do your plan.

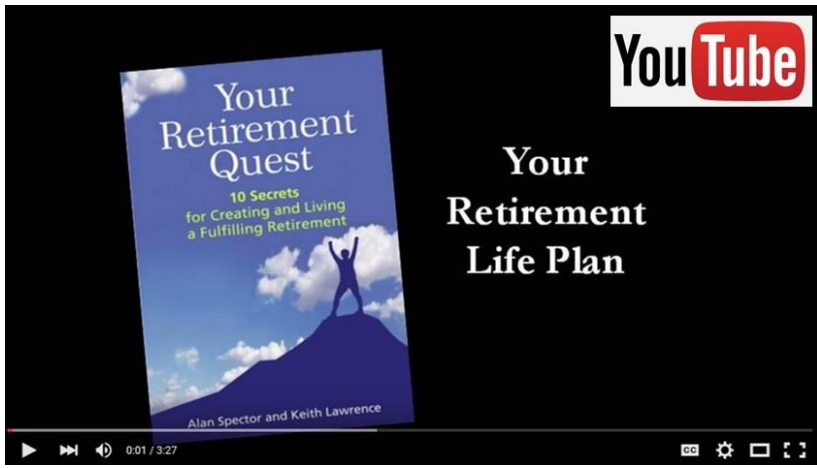
Determine how you would like to enhance each of the 10 key elements of a fulfilling retirement. Take a few moments with each key element and decide what you would like:

- ✓ **To Start in your life:** “Start” items are those that will get you on the road to greater fulfillment that you are not doing today. Examples might be to begin taking a morning walk to enhance Wellbeing, to take a class at a community college to enhance Growth, to say “yes” to that request you’ve been getting to help at the local food pantry to enhance Giving Back.
- ✓ **To Stop in your life:** “Stop” items are for things in your life that are getting in the way of your fulfillment. Examples might be to stop watching television in the evenings to give you time for more active versus passive activities, to stop eating sweet desserts after every meal to enhance Wellbeing, to stop using your smart phone when you are out with friends to enhance Connectedness.
- ✓ **To Continue in your life:** The reason you want to capture “Continue” items is to have a reminder of what is working well for you, so that as life circumstances change, you don’t lose track of these. Examples might be to continue having the multiple generations of the family together for dinner every Sunday to maintain Connectedness, to continue to keep a written bucket list to enhance Passions and Fun, to continue to have a gratitude activity at the end of every day to enhance Attitude.

The chart on the next page can help get you started and you can reference the book, *Your Retirement Quest*, to see the worksheets in the back of each key element chapter.

See Video on page 3

Key Element	Assessment Score	What is Next for Me? (Start/Stop/Continue)
Life Plan		
Purpose/ Values		
Well-Being		
Financial Security		
Attitude		
Connectedness		
Giving Back		
Passions		
Growth		
Fun		



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