Retirement Coaching

The idea of retirement has changed, which allows us to explore with our clients not only how much you need to retire, but also what it is you are retiring to.

Figuring out how much you need ("your number") is simply mechanical, and software can do that. We engage clients in a conversation to determine what it is they are retiring TO. We have developed interactive tools to help us explore this together.

What are you retiring TO?

Observations: Think about friends, family, and co-workers who have already retired. Split these individuals into two groups: <u>those who you feel HAVE retired well and those who you feel HAVEN'T retired well.</u>

Vision: Review 16 images and select up to 6 that best reflect your vision of retirement.

Retirement Worksheet: Look at the list of benefits you may receive from work and score how important each aspect is to you.

Retirementality Profile: Read through four statements and order them from "Best describes you" to "Least describes you."

Ideal Week: Create an itinerary of activities reflective of how you might spend your time during an ideal week of retirement.

As a financial advisor, we want to ensure you have enough money to sleep at night and enough purpose and passion to be excited to get up in the morning. These exercises help us to keep these goals aligned inside your financial plan. Below is your retirement coaching schedule:

Intro
3-5 years before retirement

On The Cusp
6-12 months before retirement

Honeymoon
6-12 months after retirement

Reality Check
18-24 months after retirement