

3 Steps to Creating *Your Retirement Identity*

Because nobody warned you the title was just shorthand.

STEP 1

Inventory

What You
Actually Know

STEP 2

Values

Name Your
Drivers

STEP 3

Intro

Write the One
You'll Mean

“You are not starting over. You are starting from.”

— Karen Grosz, What's Next? Retirement!

Karen Grosz

7-Time Author · TEDx Speaker · Certified Professional Coach
2024 SBA Small Business Champion, Montana

Before We Begin

Nobody warned you the title was just shorthand.

You spent decades being introduced as what you did. VP of this. Founder of that. Director of everything. And somewhere along the way, the title stopped being a description and became an answer — to who you are, why you matter, and what you bring to a room.

Then the title disappears. And so, if you're not careful, does the answer.

This guide is three steps. They are not quick. They are not flashy. But if you do them honestly — and I mean honestly, not performatively — you will walk away with something more valuable than a job title ever was: an introduction you actually mean.

A NOTE FROM KAREN

I built and closed Canvas Creek Team Building after 12 years. 80,000 participants. Fortune 100 clients. The whole thing. Then I sat in my kitchen on a Monday morning and didn't know what to say when someone asked what I did. These three steps are what I wish someone had handed me.

“You are not starting over. You are starting from.”

STEP 1 *Inventory*

What You Actually Know

The most honest thing you can do right now is take inventory.

Not of your resume. Not of your LinkedIn. Of what you actually know — the frameworks you developed in real rooms under real pressure, the decisions you made at midnight when nobody else was willing to make them, the things you figured out the hard way that no one taught you in school.

Most people skip this step because they think they already know what they know. They don't. Or rather — they know it, but they haven't named it. And you cannot build a retirement identity

on things you haven't named.

Set a timer for twenty minutes. Write down everything — every story, every lesson, every question you get asked repeatedly, every hard thing you figured out, every moment that changed how you thought about something. Don't edit. Don't organize. Just get it out.

WHAT YOU'RE LOOKING FOR

The things people always come to you for.
The lessons that cost you something to learn.
The frameworks you developed that nobody else has.
The questions you can answer that most people can't.
The stories that changed how you saw everything.

“The question is never whether you have enough material. The question is which material is ready to come out first.”

FIELD WORK — STEP 1

Do your twenty-minute inventory right now, before you move to Step 2. Then look at what came out and circle the three things that surprise you most. Those three things are usually the most honest picture of what you actually bring.

Journal question: What do you know that you've been undervaluing because it came so naturally you assumed everyone knew it?

STEP 2

Driver Values

Name Your Driver Values

Your values didn't retire. They came with you.

There is a question I ask in almost every coaching engagement, and it is the one that takes the longest to answer honestly: what do you value? Not what your organization valued. Not what your industry rewarded. What do you, personally, at the level that doesn't change when the org chart changes — actually value?

Driver values are different from aspirational values (what you wish you were) and performance values (what you've been rewarded for). Driver values are quieter and more

stubborn. They show up as the things that bother you most when they're violated. They don't change rooms.

THREE KINDS OF VALUES — KNOW THE DIFFERENCE

Aspirational: who you want to be.

Performance: what you've been rewarded for.

Driver: what you protect even when it costs you something.

Your retirement identity is built on driver values. Only those.

“The values that are genuinely yours don’t change rooms. They go with you.”

FIELD WORK — STEP 2

List ten things that genuinely matter to you right now. Narrow to five. Then to three. The three that survive the cuts are your driver values. Write them somewhere permanent. They are the foundation of everything in Step 3.

Journal question: When in the last five years did you act against one of your driver values? What did that cost you?

WHAT THIS LOOKS LIKE — EXAMPLE INTRODUCTIONS

Here's how three different people turned their driver values into introductions they actually mean. Notice: no job titles. No former companies. Just the contents of the container.

THE RETIRED EXECUTIVE

Driver values: Clarity · Accountability · Legacy

I spent 30 years making sure the right people had the right information at the right time. Now I do that for one person at a time — usually someone who just realized they've been the smartest person in the room for so long they forgot what it feels like to be challenged.

↑ Values in action: clarity (right info), accountability (one person at a time), legacy (challenging others to grow)

THE FOUNDER WHO SOLD

Driver values: Curiosity · Independence · Craft

I built something from nothing for twenty years, and I'm not done building. Right now I'm figuring out what gets built when the only person I have to answer to is me — and what that says about what I actually care about.

↑ Values in action: curiosity (figuring it out), independence (no one to answer to), craft (what gets built)

THE EXECUTIVE WHO IS NOT DONE

Driver values: Connection · Impact · Generosity

I'm in the middle of learning that the most useful thing I can do with everything I know is give it away — to the right people, at the right moment, without an agenda. That turns out to be a full-time job.

↑ Values in action: connection (right people), impact (useful thing), generosity (give it away, no agenda)

NOTICE WHAT ALL THREE HAVE IN COMMON

They tell you what the person values, not what they did.

They make you want to ask a follow-up question.

They could only be said by that specific person.

None of them mention a company, a title, or a salary.

All of them are true right now, not ten years ago.

STEP 3

Your Introduction

Write the Introduction You'll Mean

Not the one you've been using. The real one.

Here is something I want you to hear the way I mean it. You are not starting over. You are starting from. Starting from everything you've built, everything you know, everything that failed and everything that didn't. The title was the container. The contents are still yours.

The introduction you'll mean isn't a job description. It is a sentence or two that tells someone who you are at the level that doesn't change — what you value, what you're building or exploring, what you're for.

It will feel strange the first time you say it. It will feel less strange the tenth time. And somewhere around the twentieth time, it will feel like the truest thing you've said about yourself in years.

WHAT GOES INTO THE INTRODUCTION YOU'LL MEAN

One of your driver values — named directly.

What you're building, exploring, or paying attention to right now.

One thing that makes the other person want to ask a follow-up question.

That's it. Three elements. One or two sentences. Yours.

“The title was shorthand. It was a fast way for the world to understand your value. But it was never the whole story.”

FIELD WORK — STEP 3

Write the introduction you'll mean. Then say it out loud to a real person. Watch what happens on their face. If they lean in, you've got it. If they look confused, try again. The leaning in is the whole test.

Journal question: Who already knows who you are without the title? What do they see that you might be undervaluing?

You deserve a Next worth living.

The book goes deeper. Much deeper.

What's Next? Retirement! — 23 chapters of honest answers
to the questions nobody else is asking.

Get the Book — nexters.life/book

“Forward is momentum enough.”

Karen told the stories. Claude helped build the structure. Because that's how we do things around here. Honestly.