

One-to-one or couples coaching

*Navigating the transition to
retirement*



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ONE TO ONE OR COUPLES COACHING

From extensive research into this transition and working with over 1800 retirees, it is clear that a holistic approach to retirement is most effective. Many clients are fortunate to approach retirement in a planned way with time to consider options but a growing proportion experience unexpected events like bereavement, redundancy or ill-health that compound the complexity of an already tricky transition. Retirement coaching allows a tailored approach for the client(s) to drive the agenda.

Retirement is a multi-faceted transition with so many changes happening in parallel. Our approach to retirement coaching is to focus first on the client's lived experience, whatever that might be. The main objective of the coaching will be led by the client, but it typically involves understanding the situation as it stands and working together to figure out what's next. Although it is important to understand their current situation, coaching is typically forward-facing and looks at different ways they might approach their future. The transition to retirement is multi-faceted and complex whenever one retires, but the situation can be very overwhelming when retirement occurs concurrently with ill-health. It is often about optimising what is possible and, if ill-health is the limiting factor, it's about recognising this and

discussing the art of the possible. Where clients are immobile or terminal, coaching will typically focus on "being" rather than "doing" as this is self-enriching and is not health dependent.

Although many clients attend coaching on their own, we also offer couple coaching as one partner retiring can have a big impact on the other. Using coaching and mediation skills, couples can notice and navigate any dissonance together to reach a jointly crafted plan for the future, whatever their current or anticipated circumstances.

Coaching is typically held over 6 one hour sessions held monthly but cadence is adjusted to meet client needs.

MEET TESSA...

... a retirement transition coach who helps individuals navigate the personal and psychological shift from work to life beyond their careers. With a BSc in Psychology, an MSc in Coaching and Mentoring and conversations with over 1700 retirees, she combines psychological insight with practical coaching experience. Inspired by witnessing her father's experience of retirement, Tessa now runs her own business with fellow qualified associates that focusses solely on this important and complex transition.

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Coaching content will be led by the client – what is relevant and helpful for them at that time. Sometimes the conversation is very practical and pragmatic at other times it is emotional and thought-provoking. Below is a list of typical coaching topics covered within a retirement coaching context.

- Understanding retirement in a wider context:
 - Current thoughts and expectations about retirement
 - Understanding societal or embedded perspectives
 - Understanding different global and cultural perspectives
- Exiting work (if still in work)
 - Reflecting on what a good exit looks like given the situation
 - Decisions around when to exit and how to exit (tapered or sudden)
 - Clarity around succession planning
 - Considering a career legacy
 - Examining the gains and losses involved in exiting
- Exiting work (when already left)
 - Reflecting on the leaving process and what met expectations and what didn't
 - Explore any unexpected events
 - Any unfinished business still pending?
 - Examining the gains and losses involved in exiting
 - Acknowledging and accepting the situation and letting go
- Taking Stock
 - Reviewing career and contribution
 - Wheel of life - where are you now?
 - Understanding your resources and the importance of balance
- Thinking about plans, routines and phasing
- Occupying your time in retirement - learning, volunteering, leisure, portfolio, work in new capacity
- Exploration of values, motivators skills and strengths to identify fulfilling future activities and build personal Ikigai
- Reviewing situational factors
 - Understanding future financial situation and the important questions to ask
 - Meeting physical health needs in retirement and considering future needs
 - Meeting mental health needs in retirement and considering future needs
 - Thinking through housing, optimal location and considering relocation, downsizing, second home
- Review of support network impact
 - Navigating any potential impact to support networks
 - Navigating any potential impact to family relationships
 - Navigating new home/ community dynamics
- Identity work
 - Navigating identity impact from losing current role
 - Re-crafting a new identity
 - Examining purpose, meaning, mattering and links to Ikigai
- Considering your legacy for the next generation





COACHING TESTIMONIALS

"The enormity of retirement due to medical issues hit me like a tsunami, not something which was theoretical and procedural. This wasn't a 'tick' as I have experienced in other roles upon leaving that vocation. This was so constructive. I really enjoyed the wide variety of topics and the ability to decide upon which we could focus upon. We could vary the focus as we needed it."

"I can't thank you enough for helping me over the past months. It has been such a difficult and challenging time for me but you helped me no end to find some sense through all my confusion. You were so easy to talk to and I always looked forward to our sessions. It was good to get to know someone who was so good at journeying alongside me at a very difficult time in my life."

"This coaching surpassed my needs with a vast variety of themes explored. I had no expectations of retirement, yet the content covered all the questions I didn't know I needed to ask."

"I had reached a situation where I was just at odds with myself and my life. Tessa untangled everything – encouraged me to see things from other angles and helped me to identify what was really important to me."

