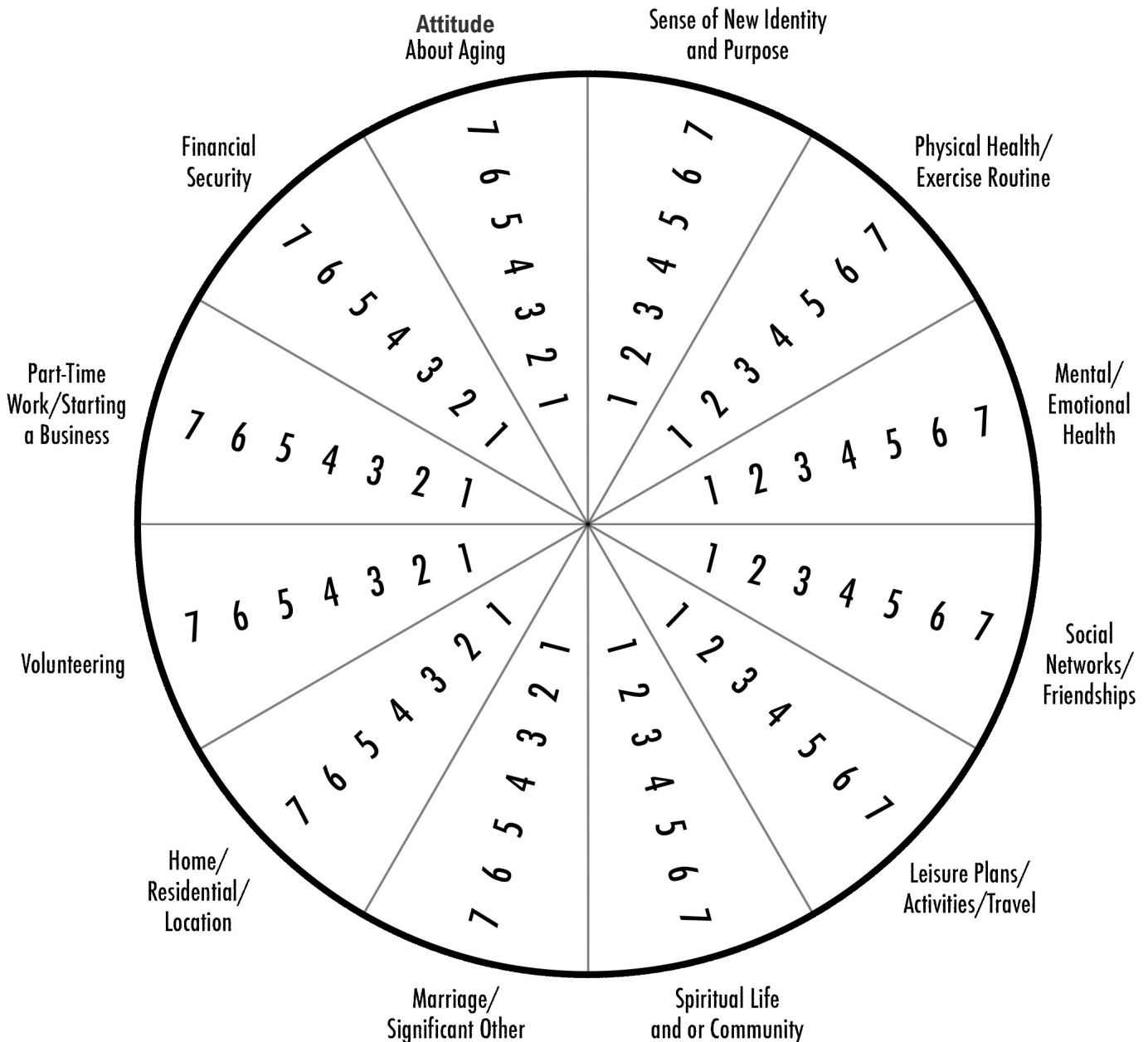


Retirement Transition Wheel[©]

To help establish a baseline for where you are in 12 key areas of a successful retirement transition, please select your level of comfort or satisfaction for each area.

(7 Highest level of satisfaction and or comfort, 1= least comfortable and or satisfaction)



Once complete, connect the numbers in each category to complete the formation of a wheel. The larger and rounder the wheel, the more prepared you are for making the transition from work-life to home-life.

If your wheel appears and feels a little lopsided, your coach can help you talk through the areas of lower satisfaction and comfort and develop a plan to make long-term improvements.