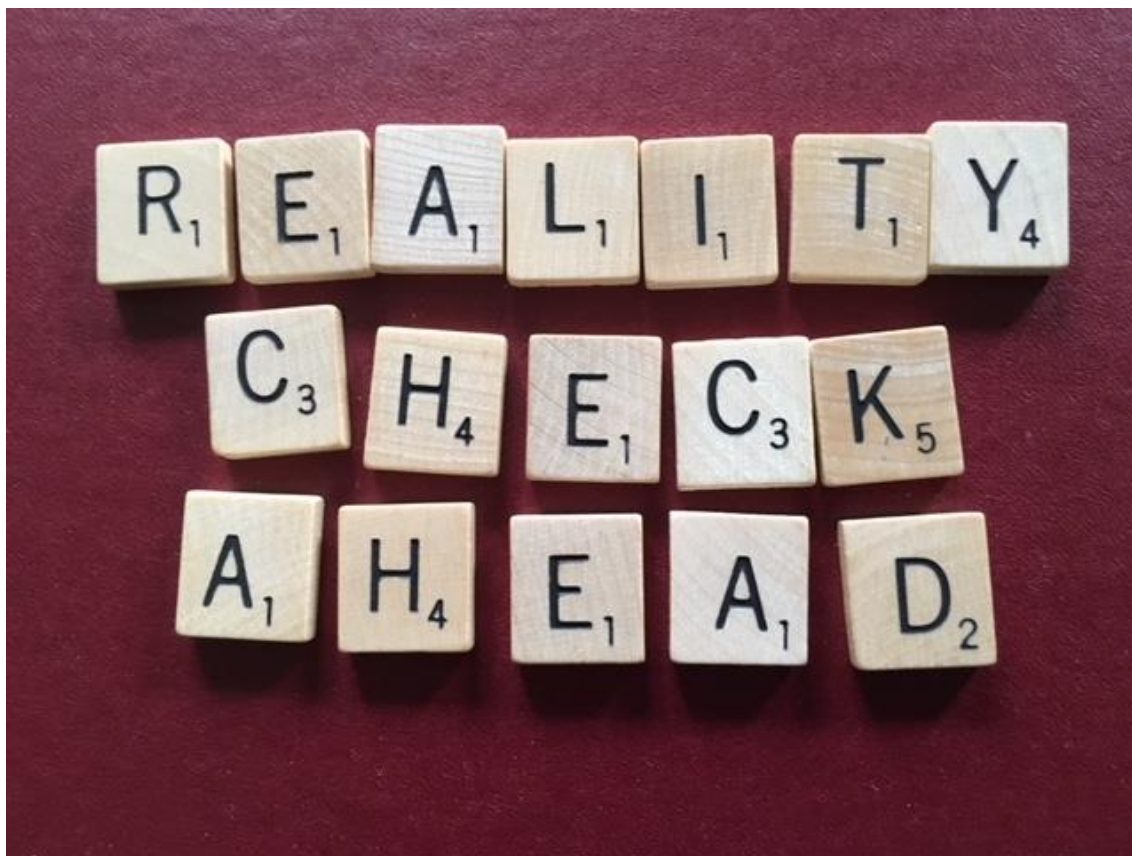


POWER UP

YOUR RETIREMENT



“An accurate, insightful view of current reality is as important as a clear vision.” Peter Senge

In this module, you will focus on taking stock of your current reality – what’s going on in your life for you right now.

You will take a deep dive into your thinking about your retirement including your fears, challenges, and concerns you may have. You will also take stock of what you are currently tolerating; frustrations; what you would like to be different and so much more.

Once you complete the exercises you will have a better idea of the areas you want to make changes in which will help you to develop your retirement goals.

Exercise #1**'My Current Reality' Questionnaire**

Please complete a 10-question questionnaire called 'My Current Reality' at the following Survey Monkey link below:

<https://www.surveymonkey.com/r/C977DB2>

After you have completed it, print off a copy of your answers for yourself and then submit it.

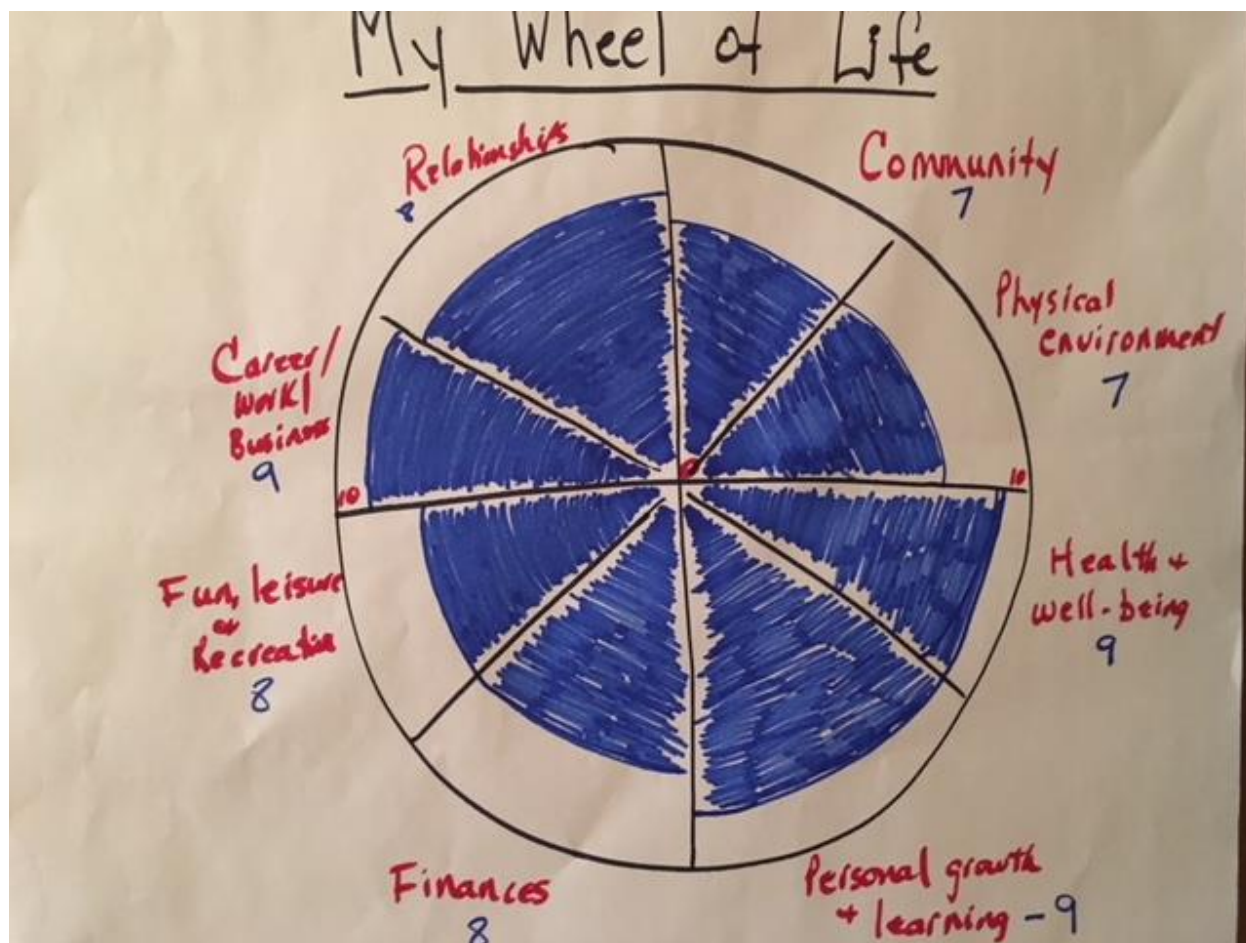
Exercise #2

Wheel of Life

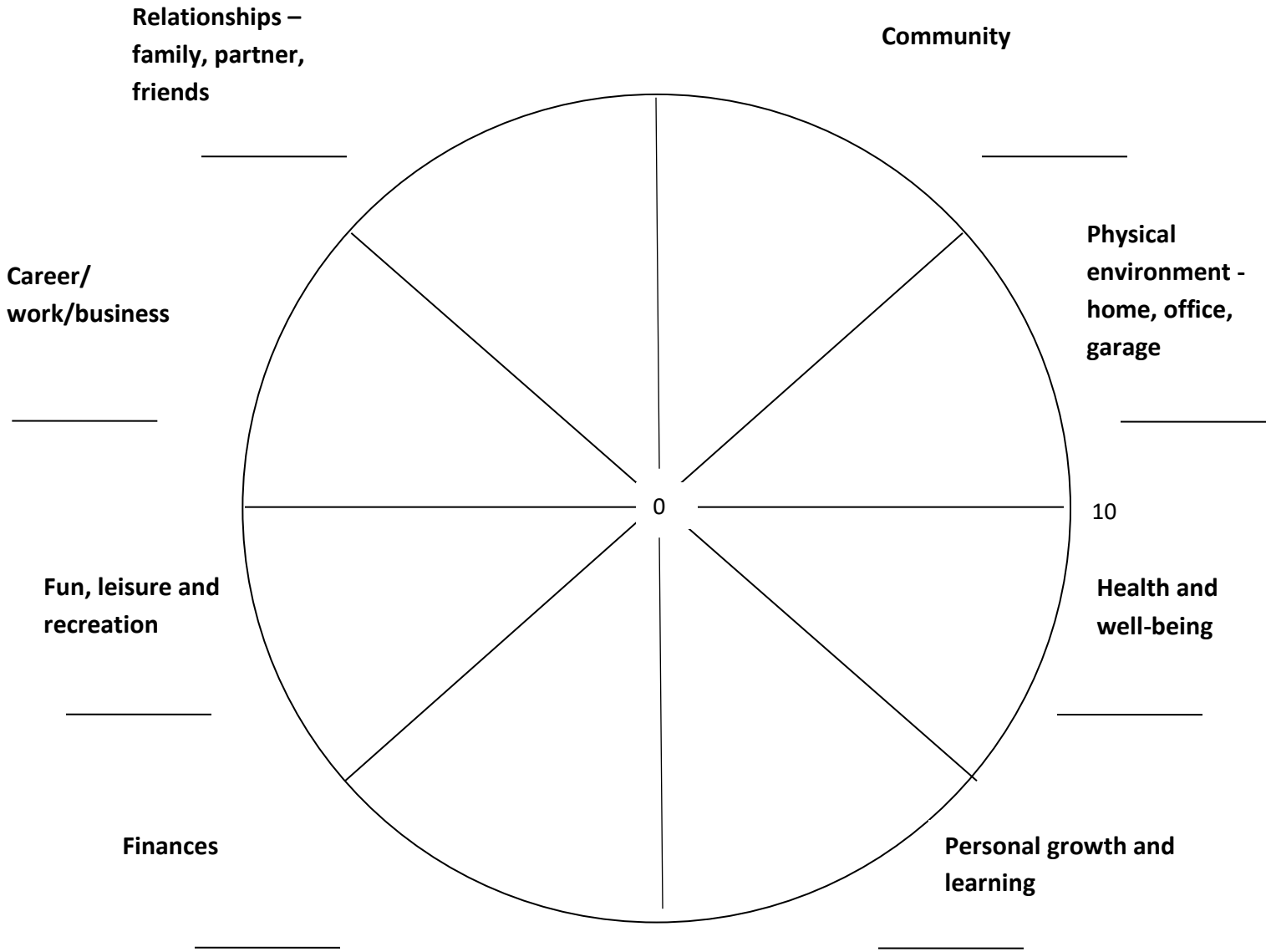
The Wheel of Life will give a visual representation or a snap shot, of how satisfied you are today with your life across eight (8) key dimensions.

Instructions

- For each of the eight dimensions, think about what success feels like for each area.
- Rank your level of satisfaction for each dimension by using a scale of 1 (very dissatisfied) to 10 (completely satisfied) by drawing a line in each segment. You can also write the number on the line below each dimension.
- Once you have assigned a value, then shade in each wedge accordingly.
- For example, an '8' for the category of 'fun and recreation' would mean that 80% of the wedge is shaded.



My Wheel of Life



'Wheel of Life' Follow-up Questions

What does your wheel of life look like? Is it a bumpy ride or is it smooth?

What automatically jumps out at you?

Are there any surprises for you?

What areas are strengths?

What areas are weaker?

How do you feel about your life as you look at your Wheel of Life?

How do you currently spend time in these areas?

How would you like to spend time in these areas?

Which of these dimensions would you most like to improve?

In what one area, if you made a change, would have the biggest impact on your life?

**What small step can you take today to improve this dimension and increase your level of satisfaction?
This week? This month?**

What support and cooperation do you need? Who can help you?

Exercise #3**Taking Stock**

On a scale of 1 (low) – 10 (high) your level of satisfaction with your life overall is: _____

What are you really satisfied with?

What are you less satisfied with?

What are you tolerating in your life at this moment?

What are the biggest frustrations you have with your life?

What do you really desire right now in your personal and / or professional life?

What do you love about your life right now?

What if anything, have you given up on in life?

What would you like to be different in your life right now?

In your life, you want: *(please check all that apply)*

- better relationships with:
 - my partner / spouse
 - my adult children
 - my colleagues
 - my friends
 - other
- more meaning
- more happiness
- more balance
- more freedom
- inner peace
- less stress
- to make a change in career or work
- to retire
- to start a new career
- to start a business
- other (please state) _____

You are ready to take action and make changes in your life today.

- yes
- no

If you're not ready, why not? What do you need before you can TAKE ACTION?

On a scale of 1 (low) to 10 (high), how committed are you in taking action today: _____

After you have completed the exercises, fill out the 'My Insights' form to capture your insights, and add any actions you are going to take in your Plan.