



WORKSHEET

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### What Matters to Me?

Reflect on these questions and write your answers. Use additional sheets of paper, if needed.

.....  
If you were asked by a child to tell about the most important thing you have learned in your life, what would you say?

.....  
What was the best period of your life? Why?

.....  
What was the worst period of your life? Why? Did you know it at the time? What did you learn?

.....  
How do you want to be remembered?



**What Matters to Me?** *continued*

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.....  
What do you think was the best thing you ever did for someone else?

.....  
If you could have anything in the world, what would it be?

.....  
If you could give anything in the world to someone else, what would you give? To whom?

.....  
What projects have given you the most pleasure?

.....  
What have you worked hardest at (work, social causes, friendships, marriage, parenting)?



**What Matters to Me?** *continued*

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.....  
What role does spirituality have in your life?

.....  
What makes you feel most alive?

.....  
What common threads do you find in your answers?

.....  
Write a sentence or two that summarizes what is most important to you.



### What Words Do I Want to Leave?

Spend some time completing the statements below. You may want to share some of your answers with people close to you so they understand who you are and what's important to you.

.....  
I write this to you, [their name], in order to . . .

.....  
These were the formative events of my life . . .

.....  
These are the people who most influenced me . . .

.....  
These are the values and principles that are most important to me . . .

.....  
These are some of my favorite possessions that I want you to have, and these are the stories that explain what makes these things so precious to me . . .

.....  
Some of the poems, essays, scriptural passages that have meant the most to me are . . .

.....  
These are the mistakes I most regret having made in my life that I hope you will not repeat . . .



**What Words Do I Want to Leave?** *continued*

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.....  
I would like to ask your forgiveness for . . . , and I forgive you for . . .

.....  
I want you to know how much I love you and how grateful I am to you for . . .

.....  
These are some of the important lessons that I have learned in my life . . .

.....  
These are some of the memories of you I cherish . . .

.....  
The best advice I ever got was . . .

.....  
These are my hopes for the future . . .

.....  
These are my hopes for you . . .

.....  
These are some messages that I would like to leave my [friend, partner, spouse, child, grandchild, niece, nephew] . . .



## Finding Meaning in My Journey

Pay attention to life as it happens and keep a journal of what you notice. Write, draw, or use other creative ways to capture your insights. These questions will help you get started.

.....  
What peak moments did I experience in the past week?

.....  
What have I seen, heard, touched, smelled, or tasted that I want to capture and observe?

.....  
What places make me happiest? Why?

.....  
What ordinary things give me extraordinary pleasure?



### My Circles of Support

	Member	What Support Do I Give?	What Support Do I Get?
<b>Inner Ring</b>			
<b>Middle Ring</b>			
<b>Outer Ring</b>			

.....  
 What changes do I want to make in my circles of support?



WORKSHEET

### What Is Important to Me in My Relationships?

There is no single formula to find a good balance in relationships. Instead, you'll want to understand your own preferences and find relationships to match them.

In the following worksheet, look at the relationship characteristics listed and circle the number that best describes your preferences.

Relationship Characteristic	Strongly Agree	Neutral	Strongly Agree	Relationship Characteristic
I like to talk.	4 3 2 1 0 1 2 3 4			I prefer to listen.
I like to be in contact with my friends frequently.	4 3 2 1 0 1 2 3 4			It's okay if I don't hear from my friends for a week or two—or even longer.
I like to ask for help and advice from my friends when I deal with a challenging problem.	4 3 2 1 0 1 2 3 4			I prefer to do my own research and come to my own conclusions when I'm faced with an obstacle.
I like to share my feelings with others.	4 3 2 1 0 1 2 3 4			I prefer not to share my feelings with others.
It's important that my friends share most of my values.	4 3 2 1 0 1 2 3 4			It's okay if my friends share just a few of my values.
I prefer seeing friends face-to-face.	4 3 2 1 0 1 2 3 4			I'm happy to have friends where our primary communication is through phone calls, e-mails, and letters.
I like doing tried-and-true activities with my friends: favorite restaurants, coffee, movies.	4 3 2 1 0 1 2 3 4			I'll try anything once, whether it's a salsa dancing class or a weekend adventure kayaking trip.
Other				
Other				

.....  
 What insights do I have from my answers?





### How Will Retirement Affect My Relationships?

Think about the characteristics of your relationships and identify specific elements that might change in retirement. If you foresee significant changes or potential problems, consider how you might address these issues.

Relationship	How Might the Relationship Change?	How Will I Address the Changes?



WORKSHEET

### Where Will I Live?

Mark (X) how important each of these factors are in choosing where to live.

	Not Important	Somewhat Important	Very Important	Notes
Proximity to family	●.....●			
Ability to remain independent	●.....●			
Cost of living	●.....●			
Transportation availability	●.....●			
Access to medical care	●.....●			
Keeping active in areas of interest	●.....●			
People similar to me	●.....●			
People different from me	●.....●			
Climate:				
Physical	●.....●			
Social	●.....●			
Political	●.....●			
Age diversity	●.....●			
Age similarity	●.....●			
Size of community (urban, suburban, small town, country)	●.....●			

.....  
 What insights do I have from my answers?



WORKSHEET

### What Do I Do Now? What Do I Want to Do When I Retire?

Use the following list to think about how you spend your time now and how you want to spend your time when you retire. Actively making choices will help keep you satisfied throughout your retirement.

You may find many activities that you hope to spend more time on—which means you'll likely have to prioritize which things are most important. You may also find that there are some activities on which you are content spending the same amount of time before and during retirement.

How much time do I spend	Now			When I Am Retired		
	Not Enough	Enough	Too Much	Want to Do More	About the Same	Want to Do Less
Alone						
With family (face-to-face or by phone, e-mail)						
With friends						
On spiritual endeavors						
Helping others						
Coaching, mentoring, teaching						
Caregiving (spouse, parents, friends, babysitting)						
Working for pay						
Volunteering						
Reading						
Writing/painting/other creative work						
Taking classes; attending lectures						
Working out						
Walking/hiking/biking/golfing/rock climbing/other physical activities						
Attending cultural events (theater, concerts, sports)						
Visiting museums, art galleries						
Listening to music/radio						
Shopping, errands						
Watching television						
Traveling						
Gardening						
Fishing/hunting						
Other						



**What Do I Do Now? What Do I Want to Do When I Retire?** *continued*

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.....  
What can I do to change “not enough” to “enough” or “too much” to “enough”?

.....  
What changes do I need to make so that it’s possible to do what I want when I retire?



WORKSHEET

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### Doing What I Want

Here's another way to explore how to use your time.

.....  
List 20 things I like to do.

.....  
What new things do I want to try?

.....  
What tried-and-true things that I know give me pleasure can I do more of now?

.....  
What priority do I put on each item listed?

.....  
What do I want to do right away?

.....  
For each of the things listed, what will I need to achieve my goals? Money? Information? Education?

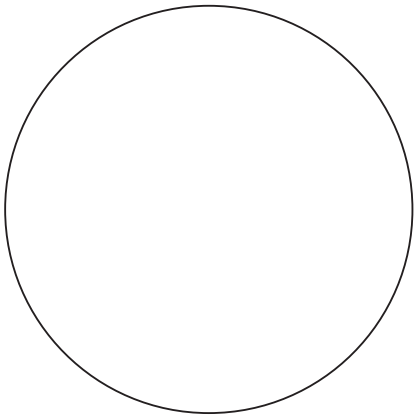
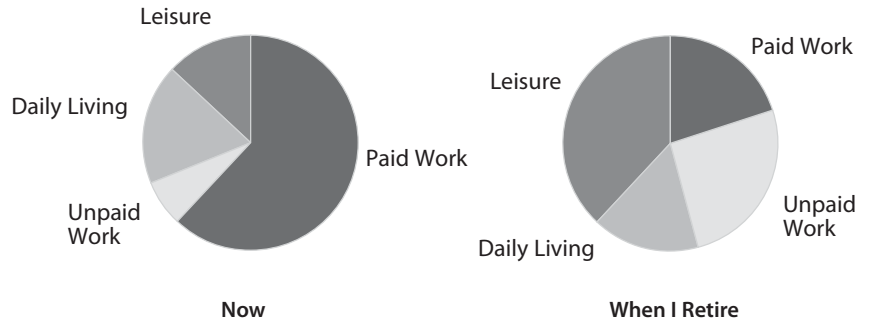


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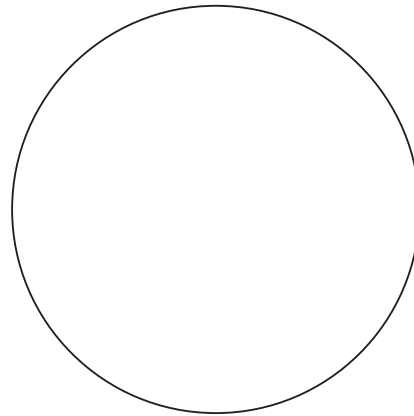
### Finding the Right Balance

As you move from full-time work to retirement, the balance in how you spend your time will probably change. It may help to visually represent how you divide the pie. Use the circles below to show how you use your time now and how you plan to use your time later. Use whatever categories make sense for you (for example, paid work, unpaid work, daily living, leisure).

Example:



Now



When I Retire



WORKSHEET

### Where Can I Have Influence in My Community?

Are you interested in providing civic leadership in a bigger way? Use this list to evaluate your community's assets and how you might contribute to a stronger community.

In the first column, mark (X) your personal priorities. In the second column, evaluate your community's assets. Where is your community strong? Where is it weak? Which of your high-priority assets are weak or lacking? For the items that you marked *Very Important*, make notes in the third column about the specific needs/issues that should be addressed.

	How Important Is This to Me?		Community Strength or Weakness?		What Are the Needs or Issues?
	Not Important	Very Important	Very Weak	Very Strong	
<b>Quality of Life</b>					
Intergenerational interaction	●.....●	●.....●	●.....●	●.....●	
Civic infrastructure	●.....●	●.....●	●.....●	●.....●	
Educational opportunities	●.....●	●.....●	●.....●	●.....●	
Access to the Internet	●.....●	●.....●	●.....●	●.....●	
Creative arts activities	●.....●	●.....●	●.....●	●.....●	
Community respect	●.....●	●.....●	●.....●	●.....●	
Parks and recreation	●.....●	●.....●	●.....●	●.....●	
Other:	●.....●	●.....●	●.....●	●.....●	
<b>Housing Options</b>					
Both renters and owners	●.....●	●.....●	●.....●	●.....●	
Affordable	●.....●	●.....●	●.....●	●.....●	
Accessible	●.....●	●.....●	●.....●	●.....●	
Community activities/services	●.....●	●.....●	●.....●	●.....●	
Assisted living	●.....●	●.....●	●.....●	●.....●	
Long-term care	●.....●	●.....●	●.....●	●.....●	
Other:	●.....●	●.....●	●.....●	●.....●	
<b>Services Supporting Independence</b>					
Transportation	●.....●	●.....●	●.....●	●.....●	
Housekeeping and yard work	●.....●	●.....●	●.....●	●.....●	
Home rehab and repair	●.....●	●.....●	●.....●	●.....●	
Home health care	●.....●	●.....●	●.....●	●.....●	
Access to service information	●.....●	●.....●	●.....●	●.....●	
Telephone/e-mail capacity	●.....●	●.....●	●.....●	●.....●	
Other:	●.....●	●.....●	●.....●	●.....●	



Where Can I Have Influence in My Community? *continued*

	How Important Is This to Me?		Community Strength or Weakness?		What Are the Needs or Issues?
	Not Important	Very Important	Very Weak	Very Strong	
<b>Food and Nutrition</b>					
Food shelves	●.....●		●.....●		
Community gardens	●.....●		●.....●		
Home-delivered groceries and meals	●.....●		●.....●		
Group meals	●.....●		●.....●		
Nutrition education	●.....●		●.....●		
Other:	●.....●		●.....●		
<b>Security (Personal, Economic, Financial)</b>					
Feeling safe at home	●.....●		●.....●		
Feeling safe in the neighborhood	●.....●		●.....●		
Employment opportunities	●.....●		●.....●		
Social services	●.....●		●.....●		
Financial and legal services	●.....●		●.....●		
Other:	●.....●		●.....●		
<b>Health Care</b>					
Affordable health care	●.....●		●.....●		
Physical, mental, spiritual activities	●.....●		●.....●		
Respite care for caregivers	●.....●		●.....●		
Hospice	●.....●		●.....●		
Other:	●.....●		●.....●		
<b>Other Areas</b>					
	●.....●		●.....●		
	●.....●		●.....●		

Consider how you might make a positive difference in areas that are important to you.

1. Make a list of some of the initial steps you could take to help improve these areas of your community. For example, if you know of other communities that have successfully addressed these needs, think about how they've done so. How might you replicate their efforts—or adapt what they've already done?
2. Do you need to do more research? Where can you get the information you need?
3. Who else might be interested in this area? Who could be an ally? How could you generate interest in this topic among your friends or other community members?
4. Where can you get the resources you will need? Can you write grants? Get government funding? Use your own resources?

(Adapted from Vital Aging Network)





## Action Plan for Living Your Life

Are you moving in the right direction to achieve your goals? To help you think about the changes you might want to make, mark (X) the following on the scale between *No Change Needed* to *Needs Immediate Attention*.

LIVING YOUR LIFE	No Change Needed	Needs Immediate Attention
<p><b>Chapter 1 – Embracing What Matters</b>                      Knowing what matters to me                      Having purpose in my life                      Leaving a legacy</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●</p>
<p><b>Chapter 2 – Building Strong Relationships</b>                      Building my social network                      Strengthening relationships with family and friends                      Being part of a community                      Relocating to another city or state</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●</p>
<p><b>Chapter 3 – Using Your Time</b>                      Exploring new options for spending my time                      Using my skills, talents, and experience                      Learning something new                      Spending more time in activities I enjoy                      Managing my time                      Doing meaningful work after I retire                      Finding opportunities that match my interests</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●</p>	<p>● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●                      ● ..... ●</p>
<p><b>Chapter 4 – Making a Difference</b>                      Developing my civic capacity                      Making a difference in my community and the world</p>	<p>● ..... ●                      ● ..... ●</p>	<p>● ..... ●                      ● ..... ●</p>



**Action Plan for Living Your Life** *continued*

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What are my retirement goals for living my life? Write your goals here and on "My Retirement Map" on pages 10–11.

.....

What barriers do I need to overcome to achieve my goals?

.....

What am I going to do to achieve my goals? Use the action steps worksheet on the next page to write down the steps and track your progress.



Action Steps Worksheet – Goal #1

Steps I Am Going to Take	Target Completion Date	My Progress	Notes
		started _____ complete! <input data-bbox="862 470 1133 506" type="text"/>	
		started _____ complete! <input data-bbox="862 680 1133 716" type="text"/>	
		started _____ complete! <input data-bbox="862 869 1133 905" type="text"/>	
		started _____ complete! <input data-bbox="862 1079 1133 1115" type="text"/>	
		started _____ complete! <input data-bbox="862 1268 1133 1304" type="text"/>	
		started _____ complete! <input data-bbox="862 1457 1133 1493" type="text"/>	
		started _____ complete! <input data-bbox="862 1667 1133 1703" type="text"/>	



### Action Steps Worksheet – Goal #2

Steps I Am Going to Take	Target Completion Date	My Progress	Notes
		started _____ complete! <input data-bbox="862 499 1133 533" type="text"/>	
		started _____ complete! <input data-bbox="862 701 1133 735" type="text"/>	
		started _____ complete! <input data-bbox="862 903 1133 936" type="text"/>	
		started _____ complete! <input data-bbox="862 1104 1133 1138" type="text"/>	
		started _____ complete! <input data-bbox="862 1306 1133 1339" type="text"/>	
		started _____ complete! <input data-bbox="862 1507 1133 1541" type="text"/>	
		started _____ complete! <input data-bbox="862 1709 1133 1743" type="text"/>	