

*retire*

# ON PURPOSE

**BEYOND FINANCIAL PLANNING:  
CREATING THE LIFE YOU WANT**

JACKSON®

FIND YOUR

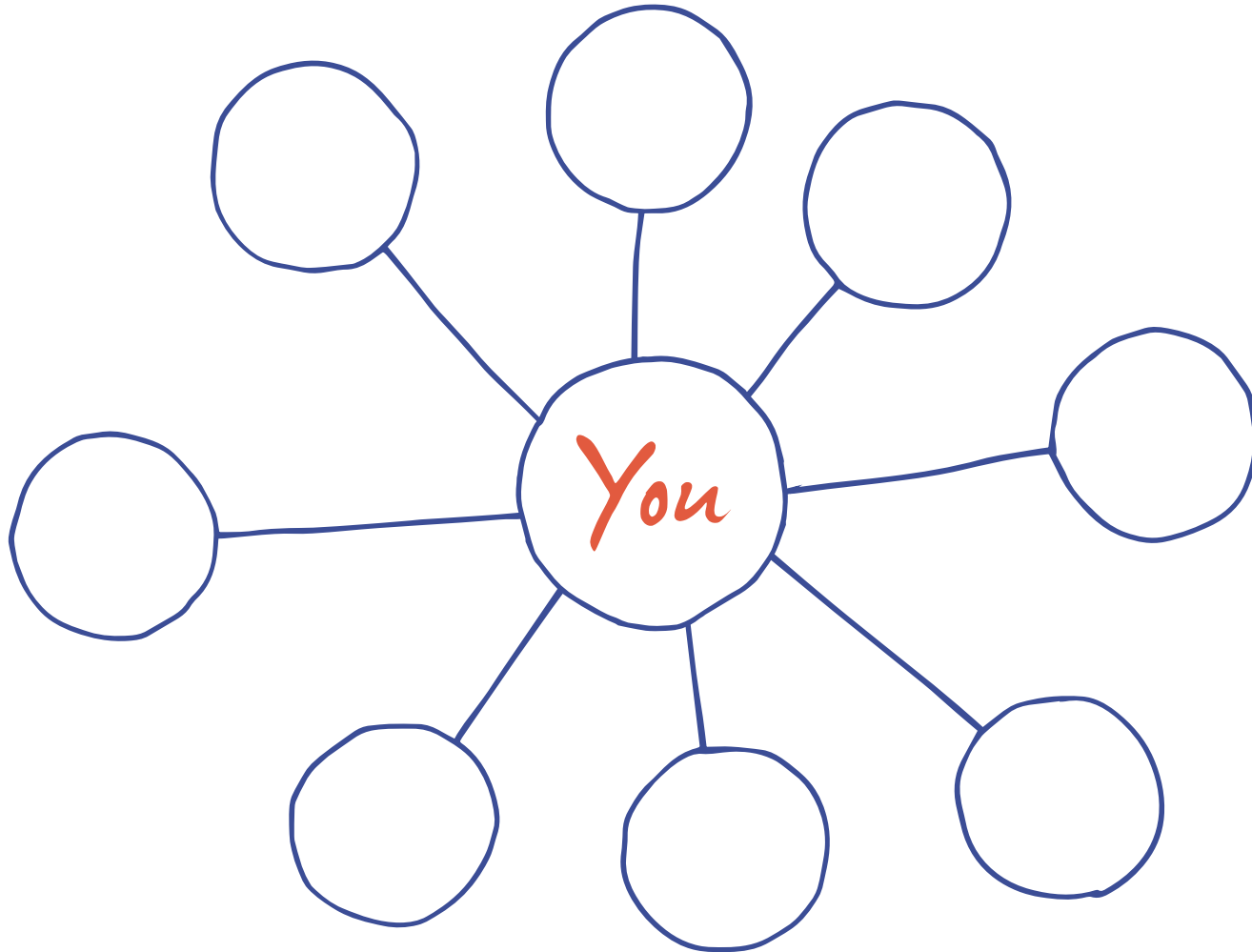
people



Relationships and social connection are vital to well-being and happiness. We crave connection with other people. And for many of us, our social connections through adulthood are often the people we work with, the people we see every day for years and years.

So what happens when you stop working and you lose that daily connection—a huge network of social interaction? It can lead to feelings of isolation and loneliness.

In the circles, write the names of a few people—other than family—you interact with at least a couple times a week.



Now, cross out all the names connected to your work or career.



FIND YOUR

place



Another consideration for your overall well-being in retirement is the place you choose to spend it. Some will want to stay right where they are. Some will want to relocate.

But it's worth considering why you chose the place you currently live. Did your career take you there? Was it because you thought it would be a good place to raise a family? When you step back and examine it, perhaps you'll find that the reasons you chose that place won't necessarily apply to your circumstances in retirement.

Review this list of qualities that could be important to where you live.

Arts + culture  
Right where you are  
Close to family  
Good public transportation  
Entertainment  
Good hiking trails  
Quiet + peaceful  
Good shopping  
Urban  
Near the mountains  
Four seasons  
Good restaurants  
Vacation lifestyle  
Biking trails  
Accessible medical care  
Cost of living  
Affordable housing  
Rural  
Retirement community  
Near the ocean  
Suburban  
Desire to downsize  
Snow  
Near a lake  
Low taxes  
Age diversity  
Close to friends  
Warm weather year-round  
Near golf courses  
Walkable neighborhood  
Sporting events

Write your top 5 in order of importance.

1.

2.

3.

4.

5.

FIND YOUR

*passion*



What excites you? What brings you joy? Are there activities or ideas you have always wanted to explore but put off because your everyday responsibilities and commitments got in the way?

Some ideas will be instantly evident to you. They've been tumbling around in your mind for years. But what if there are things you don't even know you'd be passionate about? Passions you've yet to discover?

**What's on your dream list?**

Anything you've always wanted to do.

**What's on your curiosity list?**

Something that has always fascinated you.

**What's on your mastery list?**

Something you've always wanted  
to get good at.



**KNOW YOUR**

*purpose* 

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**SAMPLE LIST OF UNIVERSAL VALUES DEVELOPED BY S. H. SCHWARTZ**

**Authority**

**Leadership**

**Success**

**Capability**

**Ambition**

**Influence**

**Intelligence**

**Self-respect**

**Enjoying life**

**Daring activities**

**Exciting life**

**Creativity**

**Independence**

**Curiosity**

**Wisdom**

**Social justice**

**Equality**

**Peace**

**Beauty**

**Unity with nature**

**Protecting the environment**

**Helpfulness**

**Honesty**

**Loyalty**

**Responsibility**

**Friendship**

**Humility**

**Devoutness**

**Respect for tradition**

**Self-discipline**

**Family security**

**Health**

**Sense of belonging**

**Spirituality**

**Love**



Because I value

\_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_

# KNOW YOUR

# purpose

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## SAMPLE LIST OF STRENGTHS

Adding humor

Analyzing information

Being a good friend

Being driven

Being generous

Being patient

Being resourceful

Breaking molds

Bringing joy

Bringing out potential

Building relationships

Building things

Creating things

Designing things

Doing the numbers

Empowering others

Facilitating change

Fixing things

Getting things right

Giving care

Growing things

Instructing people

Investigating things

Making connections

Making deals

Making things work

Managing things

Organizing things

Persuading people

Researching things

Resolving disputes

Seeing the big picture

Solving problems

Straightening things up

Translating things

Writing things

Because I value

\_\_\_\_\_ , \_\_\_\_\_ , and \_\_\_\_\_

I will use my strengths for

\_\_\_\_\_ , \_\_\_\_\_ , and \_\_\_\_\_



**KNOW YOUR**

*purpose* 

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**SAMPLE LIST OF GROUPS**

**Children/youth**

**Local commerce**

**My clients**

**My family**

**My friends**

**My work**

**The climate**

**The planet**

**Animals**

**Retirees**

**Veterans**

**My spiritual group**

**The environment**

**My neighbors**

**My community**

**My country**

**The global community**

**The less fortunate**

**The marginalized**

**My personal growth**

**Fellow citizens**

**My school**

**Seniors**

Because I value

\_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_

I will use my strengths for

\_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_

to positively impact the lives of

\_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.

FIND YOUR

*path*





To live the life you want in retirement, you'll need to consider whether your financial situation aligns with the lifestyle you envision. Answer the following questions to determine if you're on the right path:

1. Are you planning to retire on a specific date, or at a specific age? Yes\_\_\_ No\_\_\_ Unsure\_\_\_
2. Do you want or need to continue working past the date you planned for retirement? Yes\_\_\_ No\_\_\_ Unsure\_\_\_ How long?\_\_\_\_\_
3. Do you think you have the financial resources to live in the place you envision? Yes\_\_\_ No\_\_\_ Unsure\_\_\_
4. How much yearly income will you need to support your lifestyle in the future compared to your current income? Same\_\_\_ More\_\_\_ Less\_\_\_ How much?\_\_\_\_\_
5. How many years would it take to earn enough to stop working entirely—if you want to? Less than 5 years\_\_\_ More than 5 years\_\_\_ Unsure\_\_\_
6. Do you have an advisor who asks about your life goals and attempts to create a financial plan specifically tailored to achieve those goals? Yes\_\_\_ No\_\_\_ Unsure\_\_\_

Contact your advisor today to help you build a financial plan for your future.

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