

TFP...
FINANCIAL PLANNING

WealthGPS Workbook

What Does Your Life After Work Look Like?



If we were meeting 3 years from today, and you were to look back over those 3 years, what has to happen both personally and professionally for you to feel happy about your progress?

A large, empty rounded rectangular box with a dark grey border, intended for the user to write their response to the question. In the bottom right corner of this box, there is a small teal pencil icon.

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Values & Priorities

Many find that their personal values, priorities, and motivation naturally evolve as they approach retirement. Factors such as personal health, family, or new life experiences often become a greater priority. Many also place less emphasis on things like productivity, achievement, or power as they approach this stage. Generally speaking you begin placing greater value on quality of life as you near retirement.

What do you feel contributes, or will contribute to your meaningful retirement?

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What values and priorities do you see as the most important in your work, life outside work, and retirement? List 5 things in each area of life

Work	Life Outside Work	Retirement

What potential retirement activities will align with your priorities in life outside work and in retirement?

What other aspects of your life will retirement allow you to focus on or spend more time on?

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What Does Retirement Mean To You?

Our visioning exercise will help you get a clearer picture of what you want to experience when you make work optional...

Choose 6 images below that fit your vision for life after work...



Travel



Explore



Play



Write



Relax



Teach



Go Back to School



Educate Yourself



Mentor Someone



Learn a new skill



Develop a Hobby



Finish Unfinished Projects



Home Projects



More Time with Spouse



More Time with Family



More Time with Friends



Start a New Business



Continue on Present Course



Consult



Get a Part-Time Job



Connect with a cause



Volunteer



Get more Involved in Community



Take on a New Challenge

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Bringing Your Vision To Life

Now is the time to explore your vision further... Taking the 6 choices you made above, go into more and specific detail about what it means and how you will make it happen.

What Does This Mean?

How Will You Make It Happen?

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Wealth Redefined

Money contributes to happiness to a certain extent. However other factors do play a more prominent role in our well-being in retirement.

So there are two questions that we would like you to answer that will play a pivotal role in helping you live a happy, healthy & wealthy retirement

What are the non-financial forms of wealth in your life?

What are you grateful for having in your life that money couldn't buy?

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The Push & Pull Of Your Retirement Decision

When planning our retirement we are faced with a number of factors that make us want to retire or continue working. These factors are crucial to understand to help you make confident future choices

What factors are PULLING you TOWARDS retirement? - Those that make it attractive to you...

What factors are PUSHING you to TOWARDS retirement? - Circumstances that make retirement likely...

What factors are PULLING you TOWARDS continuing work? - Those you find attractive about continuing work...

What factors are PUSHING you to TOWARDS continuing work? - Circumstances making you feel like you should continue...

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What Am I Retiring From And To...

What you are retiring to is often more important than what you are retiring from. However, it is also key to understand all of the non-financial benefits of work in order to think about how you might replace those in your life after work.

Will Miss	Won't Miss



Retire From...

... Retire To



Looking Forward To	Anxious About

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My Ideal Day...

How would you like to spend your time? What does an ideal day in retirement look like?

6:00 AM	
7:00 AM	
8:00 AM	
9:00 AM	
10:00 AM	
11:00 AM	
12:00PM	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	
6:00 PM	
7:00 PM	
8:00 PM	
9:00 PM	
10:00 PM	

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My Ideal Week...

Think about what life would look like when you have complete control of your time!
Note down 1 or 2 things that you would be doing each day during the morning, afternoon and evening and start to plan what an ideal week looks like.

	Morning	Afternoon	Evening
Sunday			
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			

Impact & Leaving A Mark

Retirement is no longer seen as a time of leisure, disengagement and withdrawal but rather a time of active involvement, impact and legacy.

So, with that in mind...

What kind of impact would you like to have in retirement?

What kind of mark would you like to leave on the world and others?

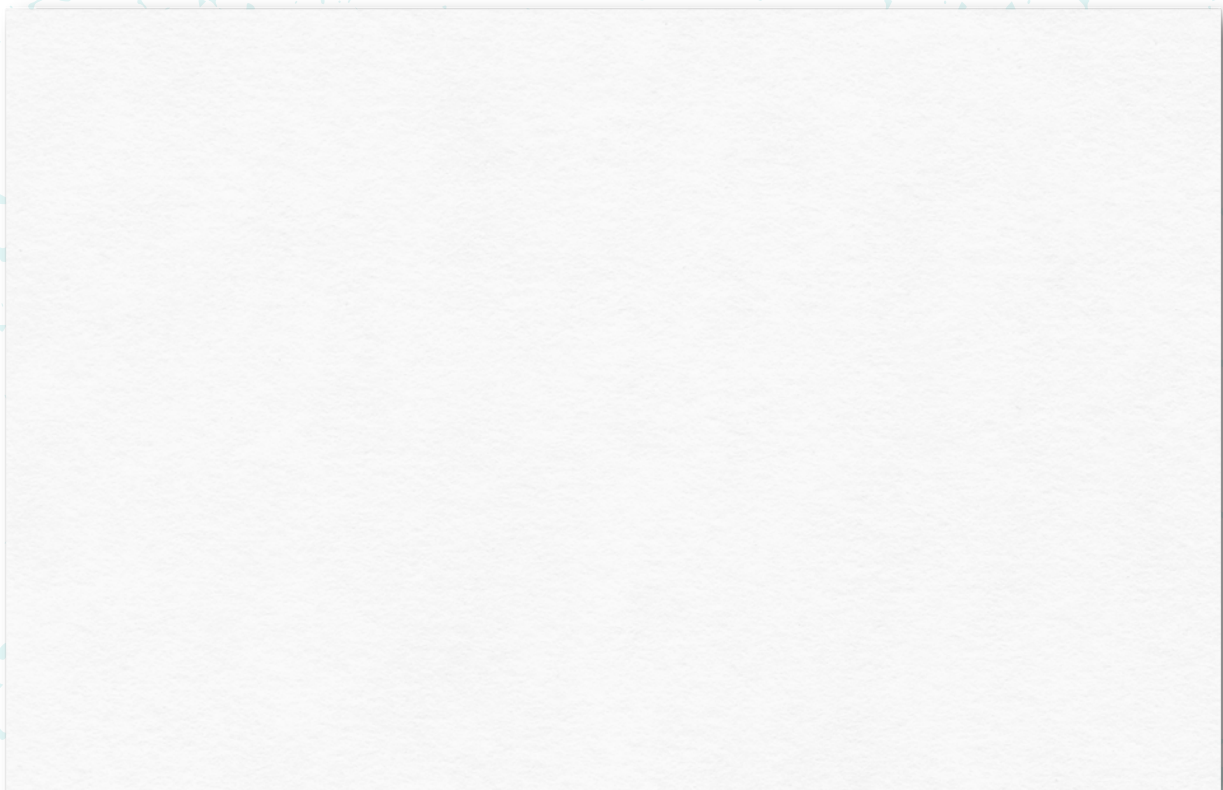
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Your Retirement Business Card

Let's imagine you're retired and at a friends BBQ having a great time, when someone who you don't know that well starts having a conversation with you. During the first few moments he asks the all important question - "what do you do?"
How would you answer that question?

If you had a business card in retirement, what would it say?

Design your retirement business card below!



The Contentment Ladder...

Please imagine a ladder from 0 at the bottom to 10 at the top.

The top of the ladder represents the best possible life for you, and the bottom of the ladder represents the worst possible life for you.

On which step of the ladder would you say you personally feel you stand at this time?



Your Statement Of Financial Purpose

Now its time to take all the thoughts, learning and conversations from exploring the questions above and craft your 'Statement of Financial Purpose'

An example is...

"Spend time travelling with family and friends, while serving our local community and contributing to the causes we care about"

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