
THE FIVE Ps™ RETIREMENT LIBRARY

The Five Ps™ Retirement Self-Assessment

A whole-life assessment for designing a meaningful next chapter.

RESOURCE 01

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A Whole-Life View of Retirement

Money may determine what is possible, but it does not determine what will feel meaningful. The Five Ps™ framework helps you examine five dimensions that shape the quality of your next chapter: Purpose, People, Projects, Pace, and Passion.

How to use this guide: Move slowly, answer honestly, and treat your responses as a starting point. Retirement planning is iterative; clarity often comes through conversation and small experiments.

The Five Ps™ at a Glance

Purpose

Meaning, contribution, usefulness, and the deeper reason you get up in the morning.

People

Relationships, belonging, family, friendship, community, and the balance of togetherness and independence.

Projects

The work, service, learning, creative pursuits, responsibilities, and challenges that engage you.

Pace

The rhythm of your days - structure, flexibility, activity, rest, health, and energy.

Passion

Curiosity, joy, adventure, playfulness, and interests that make life feel alive.

Rating Scale

Rate each statement from 1 to 5: 1 = not true for me now; 3 = partly true; 5 = very true for me now.

Purpose

Statement	1	2	3	4	5
I can describe what gives my life meaning beyond paid work.	☐	☐	☐	☐	☐
I have ways to contribute that feel useful and worthwhile.	☐	☐	☐	☐	☐
My values are reflected in how I spend my time.	☐	☐	☐	☐	☐
I am developing a clear sense of what this chapter is for.	☐	☐	☐	☐	☐

People

Statement	1	2	3	4	5
I have relationships that provide connection and belonging.	☐	☐	☐	☐	☐
I am making room for friendships, family, and community.	☐	☐	☐	☐	☐
My spouse or partner and I can discuss retirement expectations openly.	☐	☐	☐	☐	☐
I know where I want to deepen or rebuild connection.	☐	☐	☐	☐	☐

Projects

Statement	1	2	3	4	5
I have activities that engage my mind, skills, and curiosity.	☐	☐	☐	☐	☐
I have projects or experiences I look forward to.	☐	☐	☐	☐	☐
I can balance meaningful commitments with flexibility.	☐	☐	☐	☐	☐
I am willing to test new interests without needing to excel immediately.	☐	☐	☐	☐	☐

Pace

Statement	1	2	3	4	5
My current rhythm supports my energy and health.	☐	☐	☐	☐	☐
I have enough structure without feeling over-scheduled.	☐	☐	☐	☐	☐
I can make room for both activity and rest.	☐	☐	☐	☐	☐

Statement	1	2	3	4	5
My days reflect the pace I want at this stage of life.	☐	☐	☐	☐	☐

Passion

Statement	1	2	3	4	5
I regularly experience curiosity, enjoyment, or enthusiasm.	☐	☐	☐	☐	☐
I make time for interests that energize me.	☐	☐	☐	☐	☐
I am open to rediscovering parts of myself that work may have crowded out.	☐	☐	☐	☐	☐
I can name experiences I want more of in the coming years.	☐	☐	☐	☐	☐

Your Five Ps™ Profile

Add the four ratings in each section. A low score is not a failure. It identifies a potential growth area.

Purpose	People	Projects	Pace	Passion
___ /20	___ /20	___ /20	___ /20	___ /20

Which P is strongest, and what has helped it become strong?

Which P needs attention, and what is the cost of ignoring it?

From Insight to Experiment

Select one P and design a small, low-risk experiment. Examples: attend one volunteer orientation, invite two friends to lunch, take one class, protect one unscheduled morning, or revisit an abandoned hobby.

The P I will strengthen:

My 30-day experiment:

What I hope to learn:

Your Next Step

Choose one insight from this guide and turn it into a small action within the next two weeks. A phone call, conversation, trial activity, or calendar change can teach you more than months of abstract planning.

My most important insight:

One action I will take:

Interested in taking the next step?

Schedule a complimentary Retirement Discovery Conversation.

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