

FREE RESOURCE

Retirement Readiness Worksheet

Assess where you are today and
identify what matters most for your
next chapter.

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THE FIVE Ps™

Purpose
Meaning and contribution

People
Relationships and
belonging

Projects
Learning, service, and
goals

Pace
Structure, energy, and rest

Passion
Curiosity, creativity, and
joy

A practical reflection tool for designing a purposeful, connected, and fulfilling retirement.

HOW TO USE THIS WORKSHEET

Readiness Is More Than a Retirement Date

Use this worksheet to take an honest, nonjudgmental look at the life side of retirement. Rate each statement from 1 to 5, where 1 means “not yet true” and 5 means “very true.” The goal is not a perfect score. The goal is clarity.

1 = Not yet true 2 = Rarely true 3 = Sometimes true 4 = Mostly true 5 = Very true

Purpose

Statement	Your Rating
I have a sense of what will give my life meaning after full-time work.	1 2 3 4 5
I can name ways I want to contribute my experience or energy.	1 2 3 4 5
I am curious about the person I am becoming beyond my job title.	1 2 3 4 5
I have interests or causes that feel worth showing up for.	1 2 3 4 5

People

Statement	Your Rating
I have meaningful relationships outside my workplace.	1 2 3 4 5
I have people with whom I can share activities, ideas, and honest conversation.	1 2 3 4 5
My partner or family understands my hopes for retirement.	1 2 3 4 5
I am taking steps to create community rather than waiting for it to happen.	1 2 3 4 5

Projects

Statement	Your Rating
I have projects, learning goals, or commitments that will engage me.	1 2 3 4 5
I know which postponed interests I would like to explore.	1 2 3 4 5
I can distinguish between activities that merely fill time and those that matter.	1 2 3 4 5
I am willing to test ideas before making large commitments.	1 2 3 4 5

Pace

Statement	Your Rating
I have thought about how much structure I need in a typical week.	1 2 3 4 5
I can balance activity, flexibility, social time, and rest.	1 2 3 4 5
I am comfortable saying no to commitments that do not fit.	1 2 3 4 5
I have realistic expectations about my energy, health, and responsibilities.	1 2 3 4 5

Passion

Statement	Your Rating
I make room for interests that bring curiosity, enjoyment, or creativity.	1 2 3 4 5
I can name activities that make me feel energized and fully present.	1 2 3 4 5
I am willing to be a beginner again.	1 2 3 4 5
I have something to look forward to in the months ahead.	1 2 3 4 5

What Is Asking for Your Attention?

Which area received your strongest ratings? What is already working?

Which area received your lowest ratings? What may be missing or underdeveloped?

What transition are you most looking forward to?

What transition are you most concerned about?

What conversation do you need to have before retirement—or soon after?

Choose Three Practical Next Steps

Area	Your Next Step
Purpose	One conversation, activity, or experiment
People	One relationship or community action
Projects	One project to test in a small way
Pace	One change to your weekly rhythm
Passion	One interest to try or rediscover

The first step I will take is:

I will take it by this date:

The person who can support or encourage me is:

A useful retirement plan does not need to predict the rest of your life. It needs to help you take the next thoughtful step.

Continue your journey: Explore the complete Five Ps™ Retirement Library at accelerantcoach.com/resources-2/