

The Retirement Vision Planner

Create a flexible three-year picture of the life you want to build.

RESOURCE 08

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Create a Direction, Not a Prediction

A retirement vision is not a rigid plan for the next twenty years. It is a working picture of how you want to live, what you want to protect, and what you want to explore. It gives direction while leaving room for change.

Begin with the life you want to experience, then work backward toward practical choices.

1. Imagine a Satisfying Ordinary Day

Morning

Where are you? How do you begin the day? Who is present?

Midday

What are you doing? What gives the day meaning or momentum?

Afternoon

How do movement, learning, projects, service, or relationships fit?

Evening

What creates connection, enjoyment, peace, or anticipation?

2. Your Five Ps™ Vision

Purpose

How do you want to contribute, matter, or feel useful?

People

Which relationships and communities will shape your life?

Projects

What will engage your mind, hands, and experience?

Pace

What rhythm of activity, rest, and flexibility fits you?

Passion

What will bring curiosity, enjoyment, beauty, or adventure?

3. Choices That Support the Vision

Home and place

What location, housing, and community characteristics support the life you want?

Health and energy

What habits and supports help you participate fully?

Time and commitments

What deserves a regular place on your calendar?

Money and lifestyle conversations

What lifestyle assumptions should you discuss with qualified financial and tax professionals?

Work and contribution

What role, if any, should paid work, consulting, mentoring, or volunteering play?

Family and caregiving

What responsibilities, boundaries, and hopes should be discussed?

4. Write Your Three-Year Vision

Three years from now, I am living a satisfying next chapter in which...

The three qualities I most want this life to have are:

What I am unwilling to sacrifice:

5. Work Backward

Within 12 months

What decision, conversation, experiment, or action would move the vision forward?

Within 90 days

What decision, conversation, experiment, or action would move the vision forward?

Within 30 days

What decision, conversation, experiment, or action would move the vision forward?

This week

What decision, conversation, experiment, or action would move the vision forward?

Your Next Step

Choose one idea from this guide and turn it into a small, time-limited experiment. Clarity often comes from action rather than from waiting until every answer is certain.

The action I will take:

When I will take it:

Ready for a thoughtful conversation about what comes next?
Schedule a complimentary Retirement Discovery Conversation.

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