

The Retirement Life Balance Wheel

Assess eight dimensions of retirement and choose one area for a practical reset.

RESOURCE 10

Arthur Schwartz, PCC

Retirement Transition Coaching for Executives, Professionals & Couples

accelerantcoach.com | arthur@accelerantcoach.com | 619-253-5514

See the Whole Picture

A satisfying retirement is rarely created by maximizing one area. The Retirement Life Balance Wheel helps you notice where life feels strong, where it feels thin, and where a small adjustment could create greater balance.

Rate each area from 1 (very dissatisfied) to 10 (very satisfied). Use your current reality, not what you think your score should be.

Life area	1	2	3	4	5	6	7	8	9	10
Purpose and Meaning I feel useful and connected to something that matters.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Relationships I have the connection, companionship, and community I need.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Health and Energy My habits and support systems help me participate in life.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Projects and Learning I have engaging activities that challenge or absorb me.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pace and Structure My days have the right mix of rhythm, flexibility, and rest.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Passion and Enjoyment My life contains curiosity, fun, beauty, or adventure.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Home and Environment Where and how I live supports the life I want.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Financial Confidence I have appropriate professional guidance and understand the lifestyle my resources support.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Transfer your eight scores below to create a quick visual profile.

Purpose	Relationships	Health	Projects	Pace	Passion	Home	Financial
___/10	___/10	___/10	___/10	___/10	___/10	___/10	___/10

Interpret the Pattern

My strongest area

What is working, and what helps it stay strong?

My lowest-scoring area

What is missing, difficult, or out of alignment?

The area with the greatest leverage

Which improvement could positively affect several other areas?

A score that surprised me

What did I notice when I answered honestly?

A score that may reflect someone else's expectations

What do I actually want?

Choose One Area for a 30-Day Reset

Area selected:

What would moving the score up by one point look like?

One behavior to begin:

One behavior or commitment to reduce:

One person or resource that could support me:

How I will know the experiment helped:

Revisit the Wheel

Repeat the ratings in 30 to 60 days. The goal is not a perfect circle. The goal is a life that fits your priorities and circumstances.

Life area	Original	New	What changed?
Purpose and Meaning			
Relationships			
Health and Energy			
Projects and Learning			
Pace and Structure			
Passion and Enjoyment			
Home and Environment			
Financial Confidence			

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.

Arthur Schwartz, PCC
accelerantcoach.com
arthur@accelerantcoach.com
619-253-5514

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