

The Purpose Discovery Workbook

Guided reflection for finding meaning, contribution, and direction after full-time work.

RESOURCE 05

Arthur Schwartz, PCC

Retirement Transition Coaching for Executives, Professionals & Couples

accelerantcoach.com | arthur@accelerantcoach.com | 858-727-5560

Purpose Does Not Require a New Job Title

Purpose can come from contribution, relationships, service, learning, creativity, faith, community, or caring for what matters. It may be quieter and more personal than the purpose you experienced through work. This workbook helps you notice themes already present in your life.

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.

Moments of Meaning

Think of three times when you felt useful, engaged, or deeply satisfied. What were you doing? Who benefited?

Strengths You Want to Keep Using

Which abilities do people rely on you for? Which would you still enjoy using without the pressure of a full-time role?

People and Causes That Matter

Which people, communities, problems, or causes naturally draw your attention?

What You Want More Of

What experiences, emotions, or forms of contribution do you want more of?

What You Are Ready to Release

Which expectations, identities, obligations, or measures of success no longer need to guide you?

Your Lived Experience

What have you learned through work, family, hardship, leadership, service, or change that could benefit someone else?

Small Experiments

What low-risk ways could you test a possible source of purpose - mentoring, volunteering, teaching, writing, joining a group, helping a cause, or creating something?

Look for the Pattern

Review what you wrote. Circle repeated words, people, strengths, values, or forms of contribution.

Themes I notice:

The people or communities I most want to serve:

Draft a Purpose Direction

In this chapter, I want to use my experience, energy, and attention to _____ for or with _____ in a way that allows me to feel _____.

My first draft:

One experiment that could help me refine it:

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.

Arthur Schwartz, PCC

accelerantcoach.com

arthur@accelerantcoach.com

858-727-5560

Accelerant Coach provides coaching, education, reflection, and structured conversation. It does not provide therapy, investment, financial-planning, tax, legal, or medical advice.