

The Retirement Projects Planner

Turn postponed ideas and new possibilities into a realistic, energizing plan.

RESOURCE 06

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Projects Give Retirement Shape

Projects are more than chores. They are meaningful, engaging commitments that give structure to time, create momentum, and allow you to use your skills. A retirement project might involve travel, writing, family history, home improvement, volunteering, learning, mentoring, fitness, or community service.

Use this planner to move from a long wish list to a realistic portfolio of projects.

1. Capture Everything

List projects, experiences, and ideas you have postponed, imagined, or recently discovered.

Project idea 1

What is it, and why does it interest you?

Project idea 2

What is it, and why does it interest you?

Project idea 3

What is it, and why does it interest you?

Project idea 4

What is it, and why does it interest you?

Project idea 5

What is it, and why does it interest you?

Project idea 6

What is it, and why does it interest you?

Project idea 7

What is it, and why does it interest you?

Project idea 8

What is it, and why does it interest you?

2. Sort Your Ideas

Place each project in the category that best describes it today.

Ready Now

I could begin within the next 30 days.

Needs Exploration

I need more information, a conversation, or a trial experience.

Later

This matters, but the timing is not right yet.

Release

This idea belongs to an earlier version of me or no longer feels important.

3. Evaluate Your Top Projects

Choose up to five possibilities. Rate each from 1 (low) to 5 (high).

Project	Meaning	Energy	Feasibility	Connection	First Step

4. Build a 90-Day Project Portfolio

Select no more than three active projects: one meaningful, one practical, and one purely enjoyable.

Meaningful project

Desired outcome, first step, support needed, and target date:

Practical project

Desired outcome, first step, support needed, and target date:

Enjoyable project

Desired outcome, first step, support needed, and target date:

5. Protect Your Pace

- ☐ I have limited the number of active projects.
- ☐ I have left room for rest, relationships, and spontaneity.
- ☐ The projects reflect my interests rather than other people's expectations.
- ☐ I know what I will pause or stop if my calendar becomes overloaded.
- ☐ At least one project is enjoyable even if it produces no measurable result.

My weekly project rhythm

When will I work on each project, and how much time is enough?

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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