

The Top 25 Retirement Questions

Essential questions for thinking beyond finances and designing the life side of retirement.

RESOURCE 09

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Twenty-Five Questions Worth Asking

Retirement decisions often focus on dates, accounts, and logistics. These questions focus on the person and life behind those decisions. Work through them slowly. A useful answer may be a paragraph, a conversation, or simply a new question.

Mark the five questions that create the strongest reaction. Those may be the best place to begin.

1. Who am I when my professional title is no longer the first thing I say about myself?

2. What parts of work do I expect to miss most?

3. What am I relieved to leave behind?

4. What gives me a sense of purpose beyond earning and achievement?

5. Where do I still want to contribute?

6. Which relationships deserve more attention in this chapter?

7. How much time do my spouse or partner and I expect to spend together?

8. Where do we want independence as well as togetherness?

9. What communities will provide belonging after work?

10. What would an ideal ordinary Tuesday look like?

11. How much structure do I need to feel grounded?

12. How much unscheduled time do I need to feel free?

13. What activities support my physical and emotional energy?

14. What projects have I postponed that still matter?

15. Which old goals no longer belong in my future?

16. What would I enjoy even if I were never good at it?

17. What am I curious enough to try for 30 days?

18. What role should travel and adventure play?

19. Where do I want to live, and what does that place make possible?

20. What family or caregiving expectations need an honest conversation?

21. What lifestyle assumptions should I review with my financial advisor?

22. Do I want any paid work, consulting, mentoring, or board service?

23. What would make the next three years feel well used?

24. What do I want the people closest to me to experience with me?

25. What is one small experiment that could teach me something now?

Your Five Priority Questions

Priority question 1

Why does this question matter now, and who should be part of the conversation?

Priority question 2

Why does this question matter now, and who should be part of the conversation?

Priority question 3

Why does this question matter now, and who should be part of the conversation?

Priority question 4

Why does this question matter now, and who should be part of the conversation?

Priority question 5

Why does this question matter now, and who should be part of the conversation?

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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