



Preparing for the Emotional Effects of Retirement

Participant Workbook



Your Ideal Retirement

Where are you living?

Who are you with?

What are you doing?

What is a typical day like?

How do you feel?



The Meaning of Work

In small groups, discuss the “meaning of work”:

Questions that may help: What does work mean to you? What does work do for you? What impact does it have on your life?

Understanding your relationship with your job will help you deal with its absence.



Values

Write down your list of values and then rank them in order from most to least important.

Value	Rank

Compare your current activities against your list of values. How closely aligned are they?

How can you plan to live these values in retirement?



Necessary Preparations for Retirement

Preparations	Not applicable/ not needed	No work done	Needs a little work	In good shape	Notes
Financial					
Have consultant	☐	☐	☐	☐	
Have plans	☐	☐	☐	☐	
Home					
Functional	☐	☐	☐	☐	
Affordable	☐	☐	☐	☐	
Maintainable	☐	☐	☐	☐	
Location					
Community	☐	☐	☐	☐	
Province	☐	☐	☐	☐	
Country	☐	☐	☐	☐	
Partner					
Agrees	☐	☐	☐	☐	
Ready	☐	☐	☐	☐	
Has own plans	☐	☐	☐	☐	
Shared plans	☐	☐	☐	☐	
Family					
Supportive	☐	☐	☐	☐	
Involved	☐	☐	☐	☐	
Quality of time	☐	☐	☐	☐	



Necessary Preparations for Retirement (Continued)

Preparations	Not applicable/ not needed	No work done	Needs a little work	In good shape	Notes
Friends					
Number	☐	☐	☐	☐	
Quality	☐	☐	☐	☐	
Availability	☐	☐	☐	☐	
Shared plans	☐	☐	☐	☐	
Health					
Current state	☐	☐	☐	☐	
Keeping fit	☐	☐	☐	☐	
Anticipating	☐	☐	☐	☐	
Use of Time					
Personal style	☐	☐	☐	☐	
Plans in place	☐	☐	☐	☐	
With partner	☐	☐	☐	☐	
With friends	☐	☐	☐	☐	
Activities					
What you want	☐	☐	☐	☐	
Day to day	☐	☐	☐	☐	
Regular	☐	☐	☐	☐	
Special times	☐	☐	☐	☐	



Suggested Readings

- Bridges, William. **The way of transition: Embracing life's most difficult moments.** Perseus Publishing, 2001.
- Cantor, Dorothy. **What do you want to do when you grow up?: Starting the next chapter of your life.** Little Brown & Co, 2001.
- Delamontagne, Robert P. **The Retiring Mind: How to Make the Psychological Transition to Retirement.** Synergy Books, 2010.
- Fetridge, Guild A. **The adventure of retirement: Its about more than just money.** 1994.
- Hudson, Frederic. **Life Launch: A passionate guide to the rest of your life.** Santa Barbara: The Hudson Institute Press, 2000.
- Hudson, Frederic M. **The adult years: Mastering the art of self-renewal** (revised edition). San Francisco, 1999.
- Jossey-Bass. Hunnisett, Henry S. **Retirement guide for Canadians.** North Vancouver: Self-Counsel Press, 1993.
- Johnson, Richard. **Creating a successful retirement : Finding peace and purpose.** Liguori Publications, 1999.
- Kofodimos, Joan. **Balancing act.** San Francisco: Jossey-Bass, 1993.
- McDougal, Bruce. **How I stopped worrying about retirement (without alcohol, nicotine, caffeine or other artificial stimulants).** Toronto: Prentice-Hall Canada, 2001.



- Sheehy, G. **New Passages**. New York: Ballantine Books, 1995.
- Smith, Mary Helen & Smith, Shuford. **101 secrets for a great retirement: practical inspirational, & fun ideas for the best years of your life**. Los Angeles: Lowell House, 2000.
- Shultz, K. S., Kaye, M., & Annesley, M. (2016). **Retirement: The psychology of reinvention**. London: Dorling Kindersley Limited.
- Wagner, Tricia & Day, Barbara. **How to enjoy your retirement: Activities from A to Z** (2nd edition). VanderWyk & Burnham, 2002.
- Warner, Ralph E. **Get a life: You don't need a million to retire well**. Berkeley, CA. Nolo Press, 1996.
- Zelinski, Ernie. **How to Retire Happy, Wild, and Free**. Visions International Publishing, 2008.