

Create a Retirement that is
Uniquely Yours!



Self-Coaching Workbook PREVIEW

We're here to help. This Preview includes a 30-minute complimentary coaching session

Call Boomerangs at 816-651-5900 to schedule your session.

Individuals and Couples

This workbook is filled with powerful activities to guide individuals and couples to a retirement vision. With commitment to the process that intention is met with joy and fulfillment in retirement.

Small Groups

This workbook serves as a guide for like-minded people to discuss and share results to the activities. The group provides support to each of its members in the discovery of a unique retirement.

Organizations and Financial Advisors

Use this workbook to help employees and clients be intentional about retirement life planning as they transition from career.

Welcome to BOOMERangs

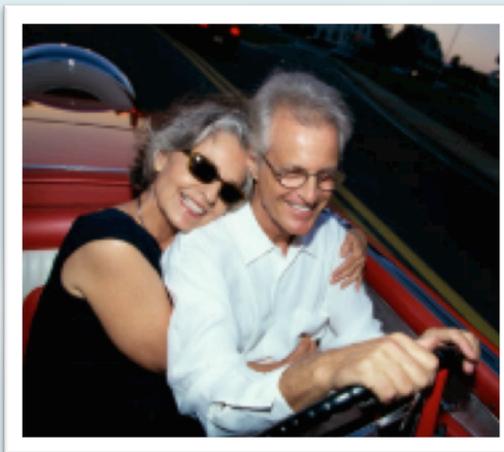
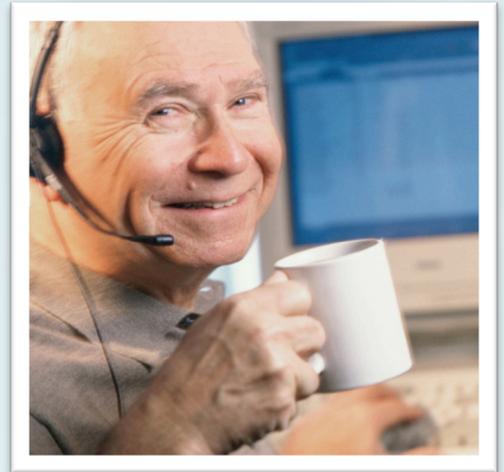
Circle Back to Your Dreams with Non-Financial Retirement Life Coaching

This is a preview version of the BOOMERangs Circle Back to Your Dreams Self-Coach Guide. It includes shortened descriptions of portions of the Circle Back to Your Dreams phases and several activities used to move you through each of them.

From it you can get a feel for the content and style of the Guide. The content is arranged according to our adaptation of William Bridges' model described in his book, Transitions. We have applied his model, specifically, to retirement.

Millions of people have successfully retired in the past and did so without the benefit of coaching (either with an actual coach or from a workbook). Millions more have struggled. BOOMERangs Circle Back to Your Dreams does not prescribe what a successful retirement is. It is a process that leads you to create, discover, refine and implement a retirement that is uniquely yours.

BOOMERangs Circle Back to Your Dreams Self-Coach Guide is best used in small groups - no more than 10 and no less than 3. The reason for this is because a group provides the same accountability to do the activities that an individual coach does. In some ways, there is even more accountability on each member of a group as it is up to them to coach all the other members.



Questions?

Contact Boomerangs Owners and Coaches

Mickie Schroeder and Jeffrey Jans

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BOOMERangs Circle Back to Your Dreams Self-Coach Guide

Introduction

When we both took early retirement from a large telecommunications company we were anxious about our finances but equally concerned about what was to come. We were 55. Our work at the company was executive coaching and leadership development so, from our way of thinking, finding a coach specializing in retirement was what we needed. The problem was, back in 2010, there were none. So we decided to fill that gap and started BOOMERangs Circle Back to Your Dreams. We were our first clients.

We were not experts on retirement but were on coaching. Gradually, while coaching many people who were about to or had retired, we learned about retirement by listening to their thoughts, feelings, excitements, disappointments, and victories. Now, we can say we know a great amount regarding one facet of what is a multi-faceted life transition. It is, we believe, equal in importance to finances and health.

What differentiates this workbook from others is how we recognize and treat retirement like the major life transition it is. The workbook is based on the 3 phases described in William Bridges' book Transitions. We have applied those phases, specifically, to retirement.

A transition is different from a change.

A change can happen quickly. Transitions, usually, take time. For instance, a person might decide to move from one living space to another and the actual move (or change) may take only a few hours. Getting used to and fixing up the new space, learning the new neighborhood, its shops, driving route, subway or buses, and other people who live there takes much longer.

The change to retirement can happen overnight but the transition is not as simple as working one day and not working the next. It is a transition that takes time as it's loaded with meaning. For some retirement signifies the end. They are washed up and put out to pasture. For others it's exciting as they, finally, get to choose what to do. For still others, choosing what to do is a scary proposition, as they've never had to do so until now. For many, this transition causes angst, frustration, and worse.

According to William Bridges, transitions begin with an ending, move to a neutral zone, and end with a new beginning. He writes, "Until people successfully transition from the old way the change won't be complete." The transition to retirement follows those 3 phases:

- **Break from Career or Profession**
The slate is cleared to make way for your next chapter
- **Take a Productive Pause**
Introspection leads to an intention or direction for the years to come
- **Make a Fresh Start**
Testing the waters to determine which options will best serve the intention



The Big Shift to Retirement

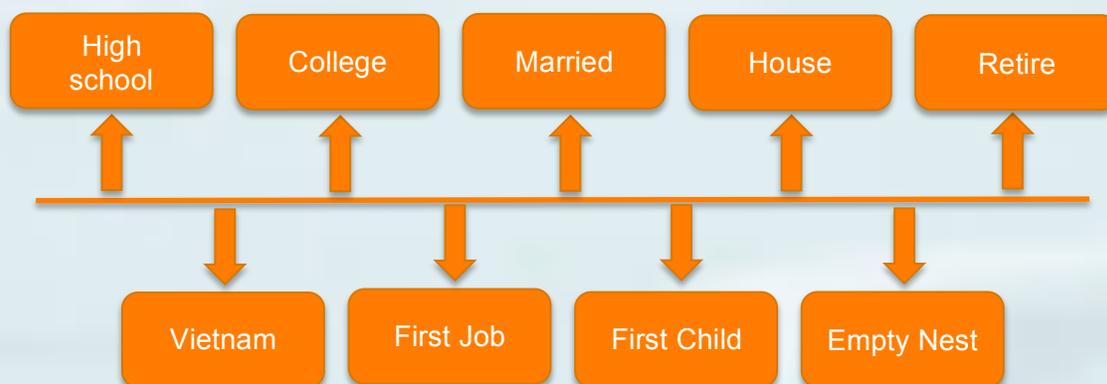
Activity #1

By the time we reach retirement age, we've lived through multiple transitions. How we've handled those transitions is a predictor of how we will handle the one to retirement. However, by reviewing your past transitions as you enter retirement, you can learn a few lessons and apply them now. In previous transitions there may have been a snag you hit at about the same time. Maybe, when too much was happening at once, you were short-tempered with people. Maybe, during certain transitions, you were so befuddled, you needed to take off for a while. Maybe, when all around you were losing their cool, you were able to problem solve. Why was that?

The objective of the TimeLine activity is to help you review past transitions for trends or patterns that may have helped or hindered your progress. Once identified, you can take actions to avoid them and/or be on the lookout for them throughout this really big shift.

Timeline Activity

Part 1. Create a timeline of the major transitions in your life.
Use the format below to create your own.



Part 2. Write about each transition in as much detail as you can remember:

- Before, during, and after the transition?
- What helped you?
- Hindered?
- Any themes?

Part 3. What or how can you use what you wrote to help with your transition to Retirement?

Instructions:

1. Use the next page to reflect and write your thoughts to parts 1, 2 and 3.
2. Discuss and share with your partner or group

Breaking from Career or Profession

Richard Johnson in The New Retirement uses Tarzan as an analogy for when a person first retires. The only way Tarzan gets through the jungle fast enough to save Jane from the clutches of an alligator is by grabbing a vine, swinging on it, grabbing another and letting go of the first one.

“Letting go” is the only way to make progress. Too often a person, when retiring, does not let go. They hold on to their profession in many ways. One of which is by adding the word, “retired” to it. It is meant to connote respect and let all know what their former status was. It is a noble idea but it’s a trap. It can keep a person living in the past.

With so many years to live after age 65 or even 70, there’s an opportunity to discover or re-discover those things that give meaning and significance to life, and do them. But you must let go in order to move on.

What keeps people from letting go?



3 Ways to Find Something “You Can Sink Your Teeth Into”

1. Past Dreams Revisited

Circle Back to Your Dreams, the title of our coaching and this workbook, focuses you on revisiting activities you may once have had great interest in and, at the least, a decent skill level but gave up for more important or pressing reasons. By “revisiting” we mean seeing them through the lens of what has transpired since you left that activity.

For example, a person may have had interest and skill as a guitar player, a desire to play in a band, and go on the road. As so often occurs, meeting the person of your dreams changes everything. Once that happens a typical path is marriage, a “real” job, kids, and all the other accouterments. The dream of playing in a band goes by the wayside. There are other paths, for sure, but that’s one we see a lot.

It may not be possible or even desirable now to “go on the road” but, maybe, there’s another version of that dream waiting to be discovered. One that takes into account all that you have become up to this moment and what is still to be. The process in this workbook leads you to discover it for yourself.

“Even though you can’t go full bore on the dreams you’ve had, at least, you can do it partially and derive some satisfaction from it,” says 94 year old Dolly, our mother/mother-in-law. “Now I say to myself, ‘I wish I’d done this or that but it’s late in the game for me now.’ What I do instead is keep thinking ‘if only.’ Before it gets too late, you kids (we are 62 when writing this) have a chance to reclaim some of that “if only.”



She says she has filled the gap in her time with “little incidental things that fill a void but nothing you can sink your teeth into.” We want you to find something that, as a result of working with this workbook; you can sink your teeth into.

2. Repurposing Your Talents and Skill

Revisiting past dreams is not the only way people discover what to do with their retirement. Re-purposing what you've been doing for 3 or 4 decades is a tack many take. A client of ours re-purposed her public relations skills from the greeting card industry to pet adoption agencies. In so doing, she combined a life-long passion for animal welfare with the skill she honed in corporate. The money was far less but she didn't care. Her retirement finances were well conceived. The satisfaction derived from working at something that is a passion was enormous. Now she donates her salary back to various agencies.

A doctor we coached re-purposed his skills by starting a free clinic and spending no less than an hour with each patient for each visit. This came from circling back to the reason he wanted to become a doctor in the first place- to be a healer. The medical machine had pushed him into seeing 4 patients every hour. Under these circumstances, there was no room for "healing" or prevention. Often, now he'll meet patients at different places in order to know them better.

3. Discover and Try Something Entirely New

Sometimes a person is so tired of their professional work they want to do something entirely different but haven't the slightest idea of what that is. For this, we invented an activity called "Good At, Tried and Liked, Interested In". We call it "GATALII". We have seen our clients' faces light up when they hit on a combination that strikes them as a perfect blending of their desires and skills. You too can experience this powerful "aha" when you engage with BOOMERangs Retirement Life Coaching.



"Its never to late to be what you might have been!" ~ TS Eliot

Take a Productive Pause

Significant and Meaningful for you Your Purpose Options to Fulfill Your Purpose

Self-reliance is much easier when you have “a bigger yes” inside you, as Stephen Covey wrote in 7 Habits of Highly Successful People. A “bigger yes” is a self-chosen purpose or direction that enables you to say “yes” or “no” to those temptations that come along. If something comes along that is aligned with your purpose you consider it. If it isn’t aligned, you easily say “no.” By defining a purpose you give yourself criteria to use when deciding which, if any, of the options you’ve generated for your retirement you will take action on.

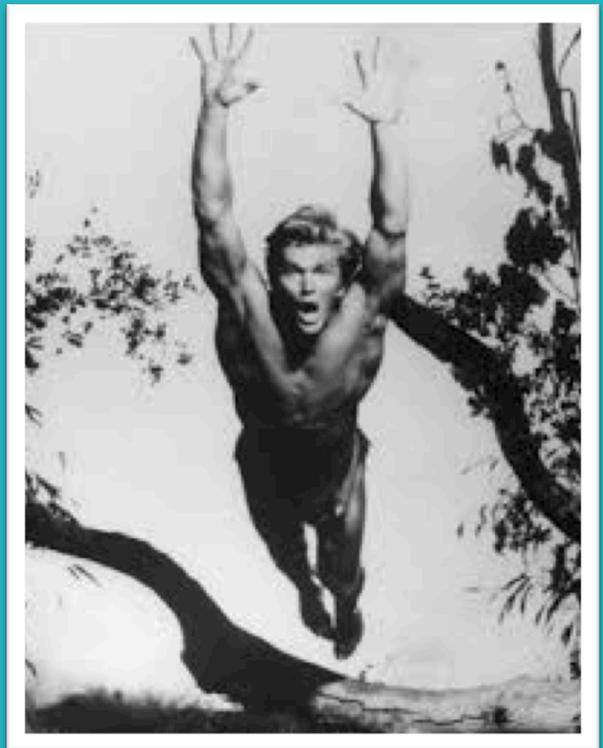
At the beginning of Break from Career or Profession, we used Tarzan swinging through the jungle as a metaphor for making progress by letting go of the first vine. One time we asked a client of ours why people have trouble letting go? She responded with, “Because they don’t see another vine in front of them.”

Taking a Productive Pause is about seeing another vine in front you.

By Taking a Productive Pause, you give yourself permission to do the introspection needed to find and connect with your purpose on this planet. This purpose can be your guide to choosing amongst the many retirement options you will brainstorm.

Take a Productive Pause is living with and, maybe even, enjoying ambiguity. It is allowing the anxiety of not knowing “what’s next” to be a positive. This is difficult because the activities and habits of your past or old life can be an albatross around your neck. They present you with a set of signals that are difficult to respond to in any but the old way.

Determining a purpose or re-confirming an existing one provides a person with the will power it takes to overcome the old ways of being or thinking about yourself. Having a defined and articulated purpose provides you a bigger “yes” that enables you to say “no” to the old way.



Significance and Purpose

Activity #3

The first activity in this workbook was about Generativity. Which is a desire for "making your mark" on the world and making it a better place.

Here's an activity to start finding or confirming what is of meaning and significance to you.



Philanthropy Part 1

Let's pretend of the \$100 million you just won from the state lottery, you get to keep \$60 million. You intend to split half of that money with your kids. You intend to donate the other half to someone or some organization that is making the world a better place.

The opportunity now is to determine who is the worthiest of the gift and how will you decide? Below are a few questions to help you decide.

Is your preference for giving in any of the following areas: arts, communication, education, health, science, environment, government, or community? There are a lot more categories but you got the idea. If yours isn't listed don't let us stop you!

Once you've picked a large, general category now list a few subcategories. For arts: performing arts (theatre, dance, and music), fine arts (painting, architecture, literature). For health: nutrition, diseases, neo-natal, geriatric)

Do you donate this money to a person or organization? To one just getting started or to one that is already established with a good track record?

What else would you need to know before giving the money to a person or organization?

Use the next page to capture areas that are meaningful and have significance to you.

Donate Your Time Instead of Your Money

Part 2

Now let's consider working or volunteering for the person or organization to whom you are (pretend) granting \$30m:

Why did you choose this organization or person to donate the money?

Is what this person or organization provides, especially, significant for you? Describe why that is.

Were you or others you know in some way helped by this service? Were you involved in this service at some point in your life? To what extent? Why did you give it up?



“The purpose of life is not to be happy. It is to be useful, to be honorable, to be compassionate, to have it make some difference that you have lived and lived well.”

~ Ralph Waldo Emerson

Create a Retirement that is Uniquely Yours!

We hope this preview of the Self-Coaching Workbook provided thought-provoking questions to guide you towards your retirement dreams. Be sure to check our website for more information and resources to help you on your journey.

Available for purchase in August 2016 is full Self-Coaching Workbook with over 20 activities to help you reclaim your purpose and live a retirement life of fulfillment and joy. If you'd like to work it by yourself we suggest you form a small group (no more than 10, no less than 3) to do group coaching. It's perfect for organizations and financial advisors who want to provide support to employees or clients transitioning away from career.

If you'd like to hire a trained coach to facilitate discussions and prompt the powerful questions, call us at 816-651-5900. We provide a complimentary 30-minute coaching session.



Visit www.BOOMERangsRetirementCoach.com to purchase the full Circle Back to Your Dreams Self-Coaching Workbook.



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Visit www.BOOMERangsRetirementCoach.com for more information and helpful resources.