

## Pre-Retirement Coaching Sample Framework

Curious about how coaching can help you? Here is an example of how coaching addressed a client's key objectives:

<b>Key coaching objectives</b>	<b>Coaching activities that target your objectives</b>	<b>Additional value that may be derived from coaching</b>
<i>What you want out of coaching</i>	<i>Things we'll work on together to help you get what you want</i>	<i>Other potential benefits</i>
<ul style="list-style-type: none"> <li>▪ Figure out how to spend my time in retirement.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Define my key priorities, interests, and preferences.</li> <li>▪ Determine what has been most satisfying about work and identify substitute sources.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discover rewarding new pursuits.</li> <li>▪ Avoid feeling bored or aimless.</li> <li>▪ Decline invitations and commitments that aren't a good fit.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Avoid feeling diminished or lost without my work identity.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Through discussion and questionnaires, explore my values, accomplishments, and strengths.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Maintain existing friendships and develop new ones.</li> <li>▪ Feel a stronger sense of congruity between my values and my actions.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Exit work without regretting my decision to do so.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Clarify my concerns about leaving.</li> <li>▪ Strategize how to exit my role in an optimal fashion.</li> <li>▪ Review lessons learned from previous life transitions.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Feel more confident setting a definitive date to retire.</li> <li>▪ Help clients, colleagues, and other stakeholders adjust to my departure.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Have a more satisfying retirement than my parents did.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Examine my assumptions about retirement.</li> <li>▪ Identify options and alternatives not available to previous generations.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Feel a greater sense of optimism and control regarding my future.</li> <li>▪ Set a positive example about retirement for my children.</li> </ul>