

Longevity Lifestyle by Design

Worksheet

Congratulations on beginning the process of designing your longevity lifestyle!

This worksheet has been developed to accompany the book Longevity Lifestyle By Design. It has been created to help you capture your assessments, ideas and action plans as you work through the book.

Step 1: Assess Your Needs Foundation

Consider your fundamental needs as described in Lesson 3. For each item, rank the priority it plays in your life (high, medium, low) and assess how you rate it currently. Record any notes, ideas or action plans you may have regarding each specific need. Especially note changes that may occur when you retire.

Retirement Needs	Priority*	Current Rating**	Ideas / Notes / Action Plans
Survival / Safety / Security			
Love and Connection			
Need for Growth			
Significance / Identity and Mattering			
Esteem			
Identity			
Contribution			
Autonomy and Freedom			
Variety			

*Use a priority rating of High, Medium or Low

**Use a rating from 1 - 5, with 1 being Low and 5 being High

Step 2: Identify Your Values

List your Values as discussed in Lesson #4. Consider using one of the Values assessment tools listed in the Reference section. Here are two values tools to help you identify your personal values, [Life Inventories.org](http://LifeInventories.org) and 3 Meaning and Valued Living Exercises from [Positive Psychology.com](http://PositivePsychology.com).

Value	Priority
	1
	2
	3
	4
	5

Step 3: Assess the Type of Retiree You Are

After a review of the retiree types discussed in Lesson #5, indicate the one that you most closely align with.

Broke Retiree		Growth Oriented Retiree	
Comfort Oriented Retiree		Angel	
Unicorn			

Step 4: Assessing Your Core Principles

After reviewing the core principles of a long and happy retirement in Lesson #6, assess your current rating of each principle. Additionally, note how this principle will be impacted by your retirement. In the second table, capture any ideas, notes or action plans related to each principle.

Principle	Current Rating*	Impact on Retirement
Relationships		
Community		
Healthy Lifestyle		
Financial Security		
Spirituality		
Attitude About Aging		
Sense of Purpose		

*Use a rating from 1 - 5, with 1 being Low and 5 being High

Ideas / Notes Action Plan

Principle	Ideas / Notes / Action Plan 
Relationships	
Community	
Healthy Lifestyle	
Financial Security	
Spirituality	
Attitude About Aging	
Sense of Purpose	


Step 5: The Work-Purpose-Longevity Connection

Redefining your sense of purpose is a critical component of a successful longevity lifestyle design. Record the components that will provide a sense of purpose in your retirement or things you would like to explore. Keep in mind that work includes volunteer work.

My Work-Purpose Connection

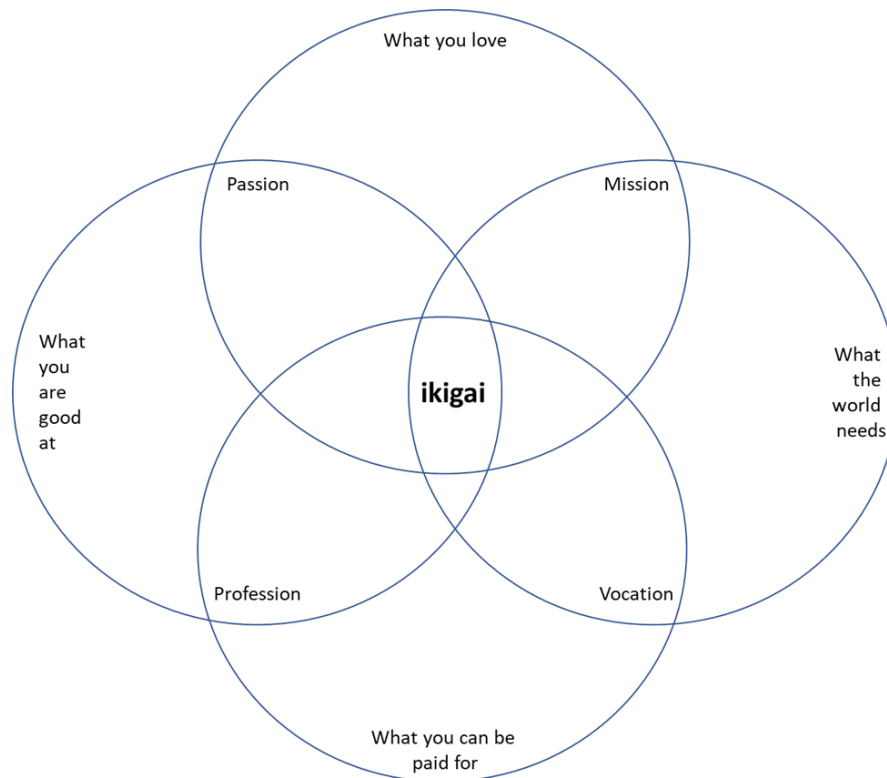
Things I do today that I may continue in retirement:

Things I would like to consider / explore:



Step 6: My Ikigai

Use of the ikigai is discussed in Lesson 8. Below is the ikigai diagram. Consider each of the components of the ikigai process and begin to fill in this template or record below under each of the questions.





What do I love to do?:

What am I good at?:

What problem do people have that I can help resolve?:

What kind of work could I do and be paid for?:

Which friends and personal contacts will I contact to help me brainstorm?:

Which role models could I shadow?:

Step 7: Designing Your Longevity Lifestyle Design

Educate Yourself

Note the items you would like to do further research on, exercises from this book you would like to complete, books you would like to read, organizations you would like to visit, role models you would like to talk with and any other exploratory work you would like to do.

Figure Out Who Are You?

Consider the questions listed in the book. Capture notable thoughts in the Notes section below.

Notes:



Figure Out Who You Want to Be

As you go through this process, review the questions listed in the book and capture notable thoughts in the Notes section below. As you do the visualization, incorporate your ikigai results and any other thoughts you've had as you've gone through this process.

Notes:



Create Vision Sketches for Testing Your Lifestyle

To further develop your vision, you may want to sketch out some of your dreams. This may add clarity and further detail to your dreams.



Design constraints and possible lifestyle traps

Consider potential constraints to your design and potential workarounds. These may include finances, health, knowledge, skills, time, etc.

Design Constraint / Lifestyle Trap	Possible Workaround

Testing Out Your Longevity Lifestyle Design

Is it possible to take your design out for a test drive? If so, capture how you would do that.

Lifestyle Component	Test Drive Plan

Create Your Weekly Schedule

Structure may be important to you as you transition from your career. Taking time to sketch out what a weekly schedule may be will help you assess whether you've incorporated the important priorities and if you have enough purposeful work to do. Capture areas to be explored further or concerns/gaps in the Notes section below.

Consider the following components:

- Family
- Friends
- Purpose/Work
- Exercise
- Learning new things
- Play and Adventure
- Time with Tribes
- Volunteering
- Creativity

	Monday	Tuesday	Wed	Thurs	Friday	Sat	Sunday
Morning							
Afternoon							
Evening							

Goal Setting

Setting goals about your vision will help guide you and attain your vision. Consider the questions listed under this section as you capture your goals below.



Goal # 1:

Goal # 2:

Goal # 3:

Costing Out the Winning Design

Once you have selected your longevity lifestyle design, you need to determine the cost. Once you have determined your spending today and the future spending, you will need to consider options if there is a gap.



Annual Cost of Today's Lifestyle	
Annual Cost of Your Lifestyle Design	
Options for Covering the Gap (if there is one)	

Step 8: Establishing Your Legacy

Consider the questions posed in this chapter about your legacy and capture notable thoughts in the Notes section below about how you may want to adjust your lifestyle to achieve the legacy you desire.

Notes:



We hope you found this worksheet helpful and it helps you to design your best longevity lifestyle!

Interested in more? Join in the conversation and get more information and resources at Booming Encore (www.boomingencore.com)

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