

Legacy (Transition) Package

**[I still have 3-7 years of work ahead of me.
I want to leave my work strong and prepare for my Intentional Life.]**

This is a nine (9) month program, meeting every other week. [18 sessions*]

It is for individuals who are **3-7 years prior** to Retirement.

This program allows clients to focus their mindset, needs, and motivations **to end their career strong.**

We also spend time starting to explore what do they want to do once they leave work and have a free schedule.

The **pre-retirement living exploration** helps them identify what knowledge and skills they want to develop so they are ready for their next chapter.

Participants will come away from this program with a clear **Vision** and **Legacy Career Plan** for how to leave their mark on their career and organization.

They will also have a high level **Who Do I Want to Be After My Career Plan.**

These plans can be modified as individuals get closer to retirement and get clearer on what they want to be doing and how they want to be showing up when they have autonomy over their schedule.

Major outcome: Clear **Vision** and a **Legacy Career Plan** for how to leave your mark on your career and organization. Also, a high level **Who Do I Want to Be After My Career Plan.** This plan will include your vision and the action steps needed to get yourself prepared for your retirement.

Session	Topic	Description
1 [Free]	Retirement Boost Session – Visioning	Explore your vision of retirement so that you can start to get even more excited about it.
2	My Professional History	<p>In this session, we will explore your professional history so you can embrace your career journey so that you structure your last few years of work in a way that is meaningful and appropriate for you.</p> <p>We explore your successes, failures, accomplishments, and lost opportunities.</p> <p>You will get a chance to remember how you overcame challenges and turned them into triumphs.</p> <p>With this knowledge you decide how you want to show up and contribute during these next few years.</p>

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3	My Personal History	<p>In this session, we will explore your personal history and aspects of your professional journey so you can identify missed opportunities or unfulfilled dreams.</p> <p>You will get a chance to remember cross-roads and opportunities left unfulfilled so that you can decide what you want to explore.</p> <p>During this session you get to unlock past dreams and begin to determine what and how to incorporate in your life.</p>
4	My Present Reality	<p>In this session, we will dive deep into your current personal and professional life so that you can so that you have an honest awareness of how you are living your daily life.</p> <p>We will explore questions like:</p> <ul style="list-style-type: none"> • What are you doing? • What are you not doing? • What do you want to change? <p>We use this awareness to redefine how you are showing up at work and what you want to do before you leave your career.</p> <p>You also will explore if you need more education, establish an exercise routine, etc. to allow you to bring these dreams into reality?</p>
5	My Future	<p>In this session, we use the information unearthed from the previous sessions so that you:</p> <ol style="list-style-type: none"> 1) are clear on how you want to show-up and what you want to accomplish in your career and 2) begin to dream about how you want to feel, show-up, and live in your ideal retirement. <p>This future reality is different for every person.</p> <p>You are challenged to share work legacies that are a stretch to accomplish yet are realistic and would give you a sense of purpose.</p> <p>You are also challenged to expose your most outrageous fantasies for your next phase of life.</p>

Session	Topic	Description
6	Anti-values	<p>During this session we will prioritize your anti-values so that you know what you want to avoid or minimize in your life.</p> <p>An anti-value is something that you do not want in your life. You do not want to cultivate. You get to define your anti-value and see how strongly you feel about it.</p> <p>The results of this session may surprise you.</p>
7	Values	<p>This session is like your anti-values except we focus on your values so that you know what you want to cultivate in your life.</p>
8	Strengths	<p>You will be provided with a character strengths assessment. We review the report from this assessment during this session.</p> <p>We will discuss how you can use your strengths along with your values and anti-values so that you can leverage this knowledge in leaving a legacy in your career.</p> <p>This knowledge also helps you improve your awareness in how you want to live and experience your life after retirement.</p>
9	Personal Mission Statement	<p>You get a chance to write your own personal mission statement so that you who you are outside of your professional life.</p> <p>This is a fun and enlightening session.</p>
10	Mirror	<p>Using your imagination, you envision what others are saying about you and what you are good at doing.</p> <p>We explore things that get you excited and what you are interested in doing.</p> <p>The result of this session is a First Draft of <i>My Retirement Plan</i>.</p>

Session	Topic	Description
11	The Professional Plan (ideation) - Professional Life	<p>Prepare a plan for completing your last few years of your current profession.</p> <p>We explore all of the options for what you could be doing professionally, if you wanted. We help you get clarity around your motivations and what you need to do to move forward.</p> <p>This session allows you to explore your emotions, thoughts, and reactions that are keeping you from ending your career strong.</p> <p>Our goal of this session is to come away</p>
12	Implement the Professional Plan	<p>During this session we will discuss how to put your plan into action. Figure out what needs to change and or be modified.</p> <p>We discuss the change management strategy and your communication plans.</p> <ul style="list-style-type: none"> - You may need to get buy-in from your employer - Communicate your plans to your leadership team - Decide how you want to show up during this time. - We want you to understand the benefits of your planning and preparation.
13	Refine the Professional Plan	<p>You choose the topic of this session.</p> <p>What is coming up for you that isn't allowing you to be fully engaged.</p> <p>This is a time to deal with any unforeseen challenges and include them in your professional plan.</p>
14	Finalize The Professional Plan	<p>We develop action steps and timelines, metrics for success, how will you know how you are monitoring your own engagement.</p> <p>We want to check in and ensure that you are staying engaged with your work until the last day. That you see the bigger picture and leave your career knowing you did all you could to leave a positive legacy.</p>
15	Who am I?	<p>Using meditation, you experience how you currently identify yourself and see who you are without the labels.</p>

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16	Life Plan	<p>We will ideate a new life plan. Looking at your life from the big rocks to the sand. How to ensure that you are experiencing the things you want instead of mindlessly taking that next step.</p> <ul style="list-style-type: none"> - Exercise - Social - Family - ...
17	Practice the Life Plan	You will have some time to practice living your life plan. There will be opportunities to journal between session. Know what is working for you and what do you want to change.
18	Finalize My Life Plan	We will devise metrics to know when you want to change your plan. Initial steps you can take and even timelines. We prepare a 6-12-month schedule with important and life fulfilling activities and actions.
19	New Identity	<p>Wow! You did it. This is the close out session. We take some time to celebrate you.</p> <p>We will also discuss Be Do Have activity and how this activity can be used to guide your life.</p>

Program comes with:

- Meet 1:1 approximately every two weeks.
- Access to my live virtual chair and mat yoga classes.
- Recordings of our sessions so you can review them later.
- Finalized Plans
- Finalized Mission Statement