

## Sage (Transition) Package

**[I'm have 1 year or less time working.  
I want transition out of my career and into my Intentional Life.]**

This is a nine (9) month program, meeting every other week.

This program focuses on your mindset, needs, and motivations around **WHO** you want to be in retirement as you create, communicate, and implement a **retirement transition plan**.

Your retirement transition plan may include:

- Communication strategies for initiating the retirement discussion with your leadership, colleagues, and staff.
- Discussion points and timeframes for announcing your retirement
- What knowledge do you possess that needs to be transferred and **How** and **To Whom** to transfer it?
- What type of celebration/recognition do you want? (I've seen individuals who don't want anything all the way up to galas celebrating an individual's career achievements.)

We also spend time starting to explore what do **YOU** want to **BE** once you leave work and have a free schedule.

We develop a detailed **Who Do I Want to Be After My Career Plan**.

We delve deep into what is YOUR purpose during this phase of your life. How do you want to give-back, show-up, live your life instead of existing through it.

We investigate your **values** (principles that are important to you), your **anti-values** (negative attitudes that you do not want in your life), what are my '**knowledge, skills, and abilities**' that I want to use in this next chapter and which ones do I want to let go of.

This plan encompasses your vision of life outside of work. It considers the time you want to enjoy a free schedule.

You get to practice the components of these plans, as necessary, so you are ready to fully implement on day 1 of your retirement.

**Major outcome:** **Clear Vision** and a **Legacy Career Plan** for how to leave your mark on your career and organization. Also, a more detailed **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.

Session	Topic	Description
2	My History	<p>What do you want to do before you leave your career?</p> <p>Do you need more education, establish an exercise routine, etc. to allow you to bring these dreams into reality?</p> <p>In this session, we will explore your personal and professional history so you can identify missed opportunities or unfilled dreams so you can decide what you want to explore.</p> <p>We will lay the groundwork for your last months at work in your current job.</p>
3	My Present Reality	<p>In this session, we will dive deep into your current personal and professional life 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"> <li>• What are you doing?</li> <li>• What are you not doing?</li> <li>• What do you want to change?</li> </ul> <p>We will explore if you need more education, establish an exercise routine, etc. to allow you to bring these dreams into reality?</p> <p>If you want to work part-time after leaving your career, start now in building the relationships and lining-up opportunities for after you leave.</p>
4	My Future	<p>In this session, we use the information unearthed from the previous sessions so that you begin to dream about how you want to feel, show-up, and live in your ideal retirement.</p> <p>This future reality is different for every person.</p> <p>You are challenged to expose your most outrageous fantasies for this phase of your life.</p>
5	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>
6	Values	<p>This session is similar to your anti-values except we focus on your values so that you know what you want to cultivate in your life.</p>

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7	Strengths	<p>You will be provided with a character strengths assessment. We review the report and discuss how you can use your strengths along with your values and anti-values in the life you are currently living.</p> <p>This knowledge also helps you improve your awareness in how you want to live and experience your life after retirement.</p>
8	Personal Mission Statement	You get a chance to write your own personal mission statement. This is a fun and enlightening session.
9	The Professional Plan (ideation)	<p>Prepare a plan for leaving your current profession. We discuss change management and communication needs.</p> <p>We dig deep into understanding what jobs you're doing now that no one knows about.</p> <p>This session focuses more on developing a tactical plan.</p>
10	Finalize The Professional Plan	<p>In this session we develop action steps and timelines, metrics for success, how will you know when it's time to leave.</p> <p>[What criteria to use to understand if the job is still worth your time to stay at or are they just treading water because of the paycheck. – optional]</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 support a smooth transition.</p>
11	Refine the Professional Plan	<ul style="list-style-type: none"> <li>- This is a time to deal with any unforeseen challenges and include them in your professional plan.</li> </ul>
12	Who am I?	Using meditation, you experience how you currently identify yourself and see who you are without the labels.
13	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"> <li>- Exercise</li> <li>- Social</li> <li>- Family</li> </ul> <p>...</p>

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14	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.
15	Finalize My Life Plan	<ul style="list-style-type: none"> <li>- 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.</li> </ul>
16	New Identity	<p>Wow! You did it. This is the close out session. We take some time to celebrate you.</p> <p>We start to work on preparing you to experience the grief <b>and</b> guilt of leaving your career. To give yourself permission to ease out of the workplace.</p> <p>We will also discuss <b>Be Do Have</b> activity and how this activity can be used to guide your life.</p>

This program comes with

- Meet approximately every two weeks.
- Each program comes with 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