



Retirement Readiness Program

For those retiring from a business professional career, KHC can assist not only with the financial planning issues but also with the non-financial aspects of the transition. “Retirement” is being re-defined by the baby boomer generation as a second phase to their lives. The original concept of retirement was born out of the industrial age, when workers retired from often physically demanding jobs with very few years left in their life expectancy. In the information age; demographic, economic, societal and health trends are driving a fundamental shift in the way Americans view and prepare for retirement. Five key factors shaping this new definition of retirement:

1. Improved health and increasing longevity – many baby boomers could have 30+ years in this phase of their life
2. Seeking a deeper purpose to one’s life and interest in contributing to society
3. Growing interest in active life styles
4. Expanding interest in post-retirement work
5. Broadening view of retirement planning that looks beyond financial issues

Sadly, research shows that people spend more time planning a two week vacation than they do planning what they will do for 30 years in retirement! With far better health and more wealth than previous generations, the baby boomers have a chance to create a wonderful and fulfilling phase to their lives – if they plan for it.

KHC uses a framework to assist you in building a plan that complements your financial plan for this exciting phase of your life. The KHC Retirement Readiness Program includes phases:

1. Identify your Values
2. Identify your Motivators, Interests and Goals
3. Understand your Skills and Strengths
4. Identify Life and Work Experience
5. Factor in Health considerations
6. Determine Lifestyle & Location choices
7. Determine Desired Activities
8. Fit with Financial Plan
9. Build Personal “Blueprint”

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Retirement Readiness Program (continued)

We work through these phases by using assessments, exercises, conducting research, asking probing questions, reading assignments and other tools. Assessments often provide valuable information to build your self awareness. Other exercises could include values card sort, interest inventories, skills assessments, and personal strengths assessment.

The key is determining how you want to use your time and talents. You will find greater fulfillment in using your time and talents if they link and bring to life your values, interests and goals. Your desired activities should encompass thinking through the importance of each of the following categories:

- Family
- Social/recreation
- Work
- Travel
- Religious/Spiritual
- Civic/Community
- Education/Intellectual

The end result of the program is a personal blueprint that outlines how you will spend your time in “retirement”. This can be such an exciting journey to take!!

“True wealth is not measured by cash flow or assets, but rather by how abundant our life is...” (The Power Years by Ken Dychtewald)

Our goal is to help you create the career and life you’ve always dreamed of – Making Life Count !

Helping corporate executives achieve their financial and career goals

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