MODULE 11

it's a *family affair*

THE WHO

You do not live in a vacuum. You retiring affects other people's lives. Period.
Who else is going to be impacted by me retiring?

THE PEOPLE MY RETIREMENT IS GOING TO AFFECT

THE HOW

Look over your list. Jot down a thing or two about how your retirement is going to affect each person.

WHO	HOW

GETTING OUT OF TOWN

Got the travel bug, eh? That's great! Here are some things for you to consider…

Are you planning to travel alone?

☐ Yes ☐ No

If you checked 'Yes" - Congrats you're finished with Getting Out Of Town!

If you checked "No" - Who is joining you?

Do they know they are joining you?

☐ Yes ☐ No

Have you spoken to them about this?

☐ Yes ☐ No

If you checked "Yes" - Fine work looping these people in on your plans. You've finished Getting Out Of Town.

If you checked "No" - You really, really, really need to have a conversation with your potential travel buddy.

If the person you have in mind to travel with turns you down - is there someone else in your life you think might want to go? Would you consider traveling alone?

I'M MOVIN' OUT

Are you tired of where you're living?

☐ Yes ☐ No

Ready for a permanent change of scenery?

☐ Yes ☐ No

If so - here are some questions.

Have you been there during all their seasons?

☐ Yes ☐ No

Do you know anyone there? Who?

Have you spoken to these people about your plans to move?

☐ Yes ☐ No

If you checked "Yes" - Strong work!
If you checked "No" - You really, really, really need to talk to these people

What sort of activities will you do there?

Let's come back home to where you live now. List all the things you love about where you live and will probably miss. People? Food? Activities? Communities you're a part of? All of it.

How much does this stuff matter to you? Is moving someplace new worth all this?

SETTING THEIR MOOD

Back in Module 2 you came up with a list of things you enjoy. Now, let's step outside ourselves. These retirement conversations are likely only going to happen between and someone you know well and care about. Think about each person you've got to talk to…
What do they like? Favorite snacks? Types of music? Things to do? Places? Etc.

WHO	SOME THINGS THEY LIKE THAT I CAN ADD

KEEP IT NONVIOLENT

C'mon… We all know how it goes. You've got great intentions to have a heart-to-heart with someone or clear the air. You start.

About a 20 seconds in you say something that causes them to bristle. You didn't mean to, but they took it the wrong way.

Now they feel like they've been attacked, get defensive, and say something back. Now YOU'RE defensive and feel like you've been attacked…. And onward and upward it goes until it explodes.

We've all been there. Here are two things you can try to avoid going back…

1. "I" statements.
2. Keeping your voice down.

"I" statements are about yourself. "You" statements are about the other person. In heated and tough conversations, the more you can keep the focus on yourself, and avoid pointing fingers and making accusations the better.

When I hear _____, it makes me feel _____.

As for keeping your voice down - calm is key. You don't have to whisper, but the lower your volume the less aggressive.

JOINT WISHLIST

You've already got yours. They might not have one or even know what a WishList is. The best way to learn is to teach - so explain the concept of a WishList and why it's good to have one to your partner or spouse. Then have them make one, just like you did.

THEIR WISHLIST

Once you both have your WishList - combine them into one! Take turns. Alternate back-and-forth, each adding one item to your Joint WishList until you're done.

OUR WISHLIST

THEIR DREAM RETIREMENT

Just like with the Joint WishList - teach them about the Dream Retirement. Make sure to emphasize this is their Dream Retirement. If they ask to see your Dream Retirement, say something like: "You'll get to see mine after you make yours. I want this to be about you and what you want…."

THEIR DREAM RETIREMENT

Now that you've both got your Dream Retirements - it's time to share. You can do this now. Over dinner tomorrow. On a walk in a few days. Whatever suits you and sounds like the most fun.

INSIGHTS