

# RETIREMENT MISSION STATEMENT WORKSHEET

## Why Create a Retirement Mission Statement?

Retirement isn't just about what you're leaving behind—it's about what you're moving toward. Having a clear mission helps you stay focused, energized, and excited about this next phase of life. This worksheet will help you craft a personal mission statement that reflects your values, passions, and goals.

*\*We suggest you grab a notebook/tablet for this worksheet!*

### Step 1.

#### *Identify your Core Values*

Choose your top 6 core values from the list, or add others that resonate with you. Get comfortable and take your time to reflect - this process is important and it shouldn't be rushed!

Freedom • Adventure • Purpose • Joy • Growth • Health • Connection  
• Imagination • Family • Legacy • Balance • Discovery  
• Engagement • Friendship • Generosity • Simplicity • Resilience  
• Authenticity • Independence • Well-being • Exploration • Learning  
• Community • Curiosity • Security • Gratitude • Laughter • Service  
• Creativity • Faith • Spontaneity • Courage • Playfulness  
• Self-expression • Reflection • Contribution • Flexibility • Compassion  
• Tranquility • Optimism • Vitality • Kindness • Fiscal Responsibility •  
Knowledge sharing • Perspective • Acceptance • Confidence •  
Respect • Spirituality • Open-mindedness • Adaptability •  
Appreciation • Positivity • Encouragement

*Write them here:*

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## Step 2.

# Define your Ideal "Next Chapter" Lifestyle

### Answer these prompts to clarify your vision:

As in the last exercise, don't rush this process - have fun and take your time to craft your answers. You might want to use a notebook.

1. What does a perfect day in your Next Chapter look like for you? (describe where you are, what you're doing and who you're with.)

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2. What does a perfect month in your Next Chapter look like?

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3. What activities, hobbies, or pursuits excite you the most?

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4. What kind of impact do you want to have (on family, community, or the world)?

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5. How do you want to feel in this next phase of life? (Examples: Fulfilled, Energized, Peaceful, Connected, Challenged, etc.)

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### Step 3.

## Craft your Mission Statement

#### Use this formula as a guide:

"In retirement, I will [how you want to live] by [activities/pursuits] so that I can [impact/feeling]."

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#### Example:

*"In retirement, I will embrace adventure by traveling to new places, trying new experiences, and meeting interesting people so that I can stay energized, inspired, and connected."*

### Step 4.

## Let's make it real!

1. What's one small step you can take today to start living your mission?

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2. What habits or routines will help you stay aligned with your mission?

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3. Who can support you in staying accountable to your vision?

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### Step 5.

## Display and Review

Congratulations! You now have a clear, purpose-driven vision for your Next Chapter.

Write your mission statement somewhere you'll see it regularly—on your mirror, in your journal, or print and put it in a frame.

Revisit it often and adjust as needed!

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