



“To be a
star,
you must *shine*
your own *light,*
follow your own *path...*”
- Author Unknown



New Horizons

Assessment — Key to Effective Retirement Planning

Retirement planning proves to be a daunting task for many people. Others may ignore or oversimplify the planning, forgetting crucial aspects and decisions that will affect their happiness and well-being in retirement. That's why our New Horizons program always begins with a comprehensive assessment – producing a LifeOptions© Profile, developed by Richard P. Johnson, Ph.D., that identifies the individual's preparedness for every facet of retirement. The profile helps individuals and their certified Career Partners International coaches focus on strengths as well as areas where they are least prepared.

Mapping Your Path to Retirement

Why is the LifeOptions© Profile the cornerstone of our retirement planning coaching?

Because using this assessment allows our New Horizons program participants to:

- Gain immediate access to information that is personal, practical and relevant; something that is most often missing from generic retirement planning courses.
- Evaluate their skills, values, interests, strengths, and other parameters that are important to them in their life and work. This process can create a new sense of self-esteem.
- Ask the right questions – questions that catapult them into a deeper understanding of who they are and what makes them happy. This also helps them to recognize and honor how a spouse or close friend might find happiness in a different way.
- Begin to envision the future by stepping back from busy, day-to-day activities and taking a look at who they are today and who they would like to become in retirement.
- Work from a truly objective third-party viewpoint that allows our New Horizons coaches to work more effectively with them from the outset.
- Understand how they react and behave in certain situations, and how unhealthy behaviors might derail their success.
- Pinpoint and brainstorm options for a “new retirement” and/or field as they are considering their transition into retirement, while providing organization of the factors that impact their current life direction.

Greene and Associates, Inc.

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New Horizons
Mapping Your Path to Retirement



Three Levels

Through this report you'll see three levels of preparation that are based on the responses you gave to the individual items on your LifeOptions Questionnaire. These three levels are:

- 1) **green** A designation of GREEN indicates significant strides in your planning for this dimension. If or not, your responses indicate that you have planned for the future.
- 2) **yellow** A designation of YELLOW indicates an adequate level of planning for your future or that you need to plan further.
- 3) **red** A designation of RED indicates that you have not planned for this dimension. It is recommended you should plan for the future.

Rankings

You will also find that a few dimensions provide a ranking versus your level of preparation. The ranking is based on the category on the questionnaire.

LifeOptions®

LifeOptions© Profile

- 99 insightful questions
- Evaluates 20 separate lifestyle and attitudinal factors
- Compares participant to others in similar circumstances
- Rankings of personal preferences provoke thought
- 3-level preparedness ranking (green, yellow, or red) provides focus

NEW HORIZONS — Mapping Your Path to Retirement

The LifeOptions© Profile is an essential start to the New Horizons program, offering objective data to drive the planning process. Certified CPI coaches use the assessment results in conjunction with the detailed 200+ page New Horizons workbook that features exercises and pointers to additional resources. The program content, along with personalized coaching, helps participants fully explore areas where additional attention is recommended, and validates areas where they already seem prepared. The workbook addresses each of these primary topics:

- Career and work
- Health and wellness
- Finances and insurance
- Family and relationships
- Leisure and social
- Personal development
- Legal and legacy

The collage displays several pages from the LifeOptions questionnaire. One page shows a 'green' level for 'Leisure & Social' with a description: 'Your Leisure & Social Arena is an expanding and dynamic arena for those who have "graduated" from their full-time work role. All that you like to do from their full-time work role: fun and play, hobbies contained in your leisure arena: fun and play, hobbies much more. In your retirement years, you will most pursuits than you did in your full-time working years'. Another page shows 'Your LifeOptions Dimensions on the Yellow level are...' with a list of dimensions: 5. LEISURE & SOCIAL - Hobbies, 6. PERSONAL DEVELOPMENT - Education, 7. FAMILY & RESOLUTIONS - Caregiving: Adult Children, 8. FINANCE & INSURANCE - Planning, and 9. CAREER & WORK - Work Benefits. Each dimension has a corresponding 'red', 'yellow', or 'green' level indicator. A third page shows '1. Leisure Preferences' with six categories: 1. Solitary Relaxation: activities done alone that are relaxing, 2. Physical Exercise: any movement of the body, 3. Intellectual Stimulation: activities that challenge the mind, 4. Spending any play, 5. Social high, and 6. Creating you. A fourth page shows '2. Residence' with a ranked list of preferences: 1. Desire to live in or close to a large city, 2. Move within your community but into a different residence, 3. Here is the ranked list of your residence preferences, 4. Split residence; perhaps move with the seasons, 5. Live in a rural setting, and 6. Create you.

* LifeOptions© Profile is copyrighted by Richard P. Johnson, Ph.D. New Horizons is a trademark of Career Partners International LLC.

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