Ruling Your World in Retirement: Reflection & Action Worksheet

By Dave Smith, The Ultimate Retirement Coach

Use this worksheet to reflect on your retirement journey and take actionable steps toward living a life of purpose, clarity, and joy.

1. Embrace Your Basic Goodness

Reflection: What strengths, values, or qualities make you proud of who you are?

Action: Write down 3 ways you can honor your core goodness this week.

2. Live with Discipline

Reflection: Which daily habits currently support your well-being, and which don't?

Action: Choose 1 new habit to implement daily for the next 7 days.

3. Develop Fearlessness

Reflection: What's one challenge or opportunity you've been hesitant to pursue?

Action: Take one small step this week toward facing it.

4. Lead with Compassion

Reflection: How can you show more understanding or care to those around you?

Action: Identify 2 specific ways to practice compassion this week.

5. Practice Generosity

Reflection: How can you give your time, attention, or skills to benefit others?

Action: Commit to one act of generosity in the next 7 days.

6. Cultivate Wisdom

Reflection: What new knowledge, skill, or perspective would enrich your life right now?

Action: Choose one learning activity to pursue this week (read, attend a class, mentor, etc.).

7. Maintain Balance

Reflection: Are you giving equal attention to your body, mind, and spirit?

Action: Plan one activity this week for each area: physical, mental, and emotional/spiritual.

8. Embody Courage

Reflection: Where do you need to stand firm or try something new in retirement?

Action: Identify one courageous action you will take this week.

9. Create a Legacy

Reflection: What impact do you want to leave on your family, friends, or community?

Action: Take one step this week toward contributing to your legacy.

10. Embrace the Warrior-King Within

Reflection: How can you combine strength, wisdom, and compassion in your daily life?

Action: Choose one practice this week that reflects the qualities of the warrior-king.

Weekly Check-In: Reflect on what worked, what felt meaningful, and what you want to continue practicing next week.