

# Retirement Purpose Audit

## *A Strategic Roadmap for Life 2.0*

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### Overview

The math of FIRE (Financial Independence, Retire Early) is only half the battle. This audit is designed to help you identify the "Life 2.0" foundation you need to thrive once the paycheck stops. Be honest—your future self is counting on it.

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### Section 1: The Psychological Infrastructure

Rate your current readiness to replace the "Big Five" benefits of work on a scale of **1 (No Plan)** to **10 (Solid Plan)**.

Category	Description	Score (1-10)
<b>Routine</b>	A structured reason to wake up and get moving daily.	_____
<b>Identity</b>	A self-definition that is independent of your former job title.	_____
<b>Connection</b>	A social circle accessible during standard working hours.	_____
<b>Purpose</b>	A mission or problem that keeps you engaged and motivated.	_____
<b>Mastery</b>	Opportunities to feel competent and "good" at something.	_____

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### Section 2: The "Rainy Tuesday" Simulation

The honeymoon phase of retirement (The Vacation Phase) eventually ends. Imagine a typical Tuesday, six months post-retirement. The weather is poor, and you have no travel plans.

**Outline your schedule for the "Middle Day" (10:00 AM – 4:00 PM):**

- 10:00 AM:

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- 12:00 PM:

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- 02:00 PM:

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- 04:00 PM:

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### Section 3: The Talent Transfer Matrix

Your professional skills are assets that can be "re-deployed." List three skills you enjoy and how they might manifest in a non-corporate environment.

Skill You Enjoy	Non-Work Application (Volunteer, Hobby, Side-Project)
1.	
2.	
3.	

### Section 4: The Curiosity Horizon

List five pursuits you have delayed due to your career. Choose **one** to "Beta Test" in the next 30 days.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Coach's Final Assessment

- **Score 40–50: Retirement Ready.** You are moving *toward* a vision, not just away from a job.
- **Score 25–39: The Transition Gap.** Your financial plan is likely ahead of your lifestyle plan. Focus on Section 1.
- **Score Below 25: High Risk.** You are at risk for "Retirement Shock." We need to build your "Life 2.0" before you exit.