



GOAL-SETTING FOR A PURPOSEFUL RETIREMENT

COURSE OVERVIEW WORKBOOK ✨

Course Objectives Summary

Introduction to Retirement Challenges

- Understand common challenges retirees face, such as lack of motivation, purpose, and structure.
- Recognize how these challenges can impact your well-being.

The Power of Goal Setting (Module 2)

- Learn the science behind goal setting and its impact on the brain.
- Discover how meaningful goals can improve mental and physical well-being and add structure and purpose to your life.

The SMART Goal Framework (Module 3)

- Learn how to set Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals.
- Understand the tailored approach to applying the SMART framework specifically for retirees.

Setting Meaningful and Motivating Goals (Module 4)

- Learn to set goals that are deeply rewarding and personally significant.
- Build confidence to pursue and achieve goals of any size.

Staying Motivated and Overcoming Obstacles (Module 5)

- Master strategies to stay on track and overcome challenges when pursuing goals.
- Turn your SMART goals into reality with actionable techniques.



Module 1

UNDERSTANDING THE CHALLENGES OF RETIREMENT



Module 1: Understanding Retirement Challenges



Overview:

- Discover the common challenges retirees face, including loss of structure, routine, and social connections.
- Learn how these challenges can impact overall happiness and well-being.

Goal:

- Help you identify the specific challenges that you are currently facing or have faced in the past to set the foundation for personal growth.

Outcome:

- Complete an exercise to identify your specific challenges, creating awareness and preparing for future goal-setting.

Notes



Module 2

THE POWER OF GOALS IN RETIREMENT



Module 2: The Power of Goals in Retirement



Overview:

- Learn why setting meaningful goals is essential for a fulfilling retirement. Understand how goals bring focus, purpose, and excitement to this new phase of life.

Key Lessons

- The benefits of goal-setting for mental health, physical well-being, and purpose.
- The categories of goals, such as personal growth, health, relationships, hobbies, and community involvement.

Outcome:

- Gain clarity on the transformative potential of goals and begin thinking about areas where you want to focus your efforts.

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Module 3

THE SMART GOAL SYSTEM



Module 3: Introducing the SMART Goal Framework

Overview:

- Explore the SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goal-setting framework to create clear, actionable, and motivating goals.

Key Lessons:

- What SMART Goals are and how they work in everyday life.
- Why the SMART system is effective in achieving retirement goals. ✧

Outcome:

- Understand how to apply the SMART framework to your goals and see how it ensures focus, structure, and measurable progress.

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Module 4

CREATING SMART GOALS ALIGNED WITH
YOUR PASSIONS AND VALUES



Module 4: Creating SMART Goals Aligned with Your Passions and Values*

Overview:

- Learn how to set meaningful goals that align with your passions, interests, and core values using a step-by-step process.

Key Lessons:

- Reflecting on past joys and current interests using the "Discovering Your Passions and Interests" worksheet.
 - Identifying core values and connecting them to key life areas with the "Using Your Core Values to Set SMART Goals" worksheet.
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- Establishing actionable intentions for your goals.

Outcome:

- Able to create personalized goals that reflect your unique passions, values, and vision for a purposeful retirement.

This image shows a top-down view of an open notebook. The notebook has a dark blue cover visible around the edges. The two exposed pages are white and feature horizontal grey ruling lines. At the top center, where the pages meet, there is a header section with a light beige background. This section contains the word "Notes" in a bold, dark blue font. Below the header, each page has ten additional horizontal grey lines for writing.



Module 5

STRATEGIES FOR ACHIEVING GOALS AND
OVERCOMING OBSTACLES



Module 5: Strategies for Achieving Goals and Overcoming Obstacles ✱

Overview:

- Gain practical tools and techniques to move goals forward, overcome obstacles, and maintain motivation.

Key Lessons:

- Mapping out actionable steps, prioritizing tasks, and setting realistic timeframes.
- Overcoming common challenges like self-doubt, competing priorities, and lack of motivation.
- Using time-management techniques like time blocking and task batching. ✱

Outcome:

- You will develop effective action plans and gain confidence in their your to achieve your goals, creating a fulfilling and purposeful retirement.

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