

Interactive Roadmap Workbook

THE RETIREE'S GOAL ROADMAP



The Retiree's Goal Roadmap

INTRODUCTION

Setting goals in retirement can feel surprisingly challenging. After years of schedules, responsibilities, and clear expectations, this new phase of life often comes with more freedom—but less structure. If you've ever felt unsure where to start, you're not alone.

This Goal Roadmap helps you gently and consciously add meaning, purpose, and structure to your days. This activity helps you develop tiny, realistic, and practical milestones to move forward one step at a time instead of massive, overwhelming changes.

You don't need to have everything figured out right now. And you don't need to reach a "perfect" outcome. The most important thing is simply to begin moving forward.

- The true goal of this exercise is to create positive momentum in your life. When you see yourself taking small steps that lead to positive experiences—more energy, more enjoyment, more confidence—you'll naturally feel more motivated to continue.
- Remember, missing a milestone doesn't mean you failed. Retirement is about learning, changing, and experimenting. It's normal to stumble or change direction. Showing up for yourself and gently getting back on track is most important.

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A Helpful Tip!

Choose a goal that feels meaningful and achievable for where you are right now—not where you think you should be. “Doable” looks different for everyone, especially in retirement, and it’s shaped by your health, energy, interests, and past experiences.

Ideally, your goal should stretch you just a little—enough to feel exciting—but not so much that it feels discouraging.

For example, if you've been inactive for years and want to “get in peak physical shape,” start with something more supportive like “move my body three times a week and feel stronger and more energized.” Small, achievable goals boost confidence, which opens doors to bigger opportunities.

You can always set new goals as you grow. This roadmap is about progress, not pressure.

Here's How It Works

- 01 First, choose one goal that would add more meaning, purpose, or structure to your life—and that you truly believe you can work toward with consistent effort.
- 02 Next, identify a few small first steps (milestones) that will help you start moving in the right direction. You don't need to plan everything at once—just the next steps.
- 03 Begin taking action on the milestones you've written down.
- 04 As you move forward, you can continue adding new milestones and adjusting your plan based on what you learn about yourself along the way.

This is your roadmap—flexible, personal, and designed to support you as you build a retirement that feels fulfilling, intentional, and truly your own.

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I will take the following daily/weekly small steps:

Step 01	Date:		Step 07	Date:	
Step 02	Date:		Step 08	Date:	
Step 03	Date:		Step 09	Date:	
Step 04	Date:		Step 10	Date:	
Step 05	Date:		Step 11	Date:	
Step 06	Date:		Step 12	Date:	

My end goal is:

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REFLECTIONS

Think about your progress during this part of the exercise. You will have a better idea of what is working and what isn't. In addition, it's a wonderful way to boost your mental state and keep you going in the right direction.

01 How do you feel about your progress so far?

02 What have you learned about yourself during this exercise? Perhaps you can identify specific actions to take when you feel motivated?

03 What has been the hardest thing during this exercise? What can you do to make it easier?

04 Have you seen any little improvements?