SECTION 1 OUTLINE

INTRODUCTION: PURPOSE DRIVEN RETIREMENT COACHING GUIDE™

The Purpose Driven Retirement Coaching Guide™

LESSON 1 - An Overview	**QUESTIONS CLIENTS ARE ASKING** • “What will retirement really be like? • “What am I going to do in retirement?” • “How do I make the most of my time in retirement? • “How can I leave a legacy?” The primary focus in this course is on the non-financial aspects of retirement planning.
LESSON 2 - What You’ll Learn in This Course	**THE FOUR PILLARS** 1. *Rediscovering Your Uniqueness* 2. *Reorient and Repurpose* 3. *Social Connections* 4. *Leave a Legacy* **MOVING FORWARD** The Four Pillars explore various aspects of retirement, offering practical exercises and worksheets for personalized planning. The guide includes the Retirement Summary Plan, combining all pillars into a step-by-step strategy for your clients and their success. Advisors will receive a full 20+ page workbook with materials like the Refocus Transition Wheel, Retirement Summary Plan, as well as a comprehensive slide deck, and other necessary client-facing tools to enhance client discussions. Workbooks can be shipped to your firm as well. As you go through the course modules, ensure that you are downloading and filling out the corresponding worksheets for a better understanding and more immersive experience.