

REIMAGINE RETIREMENT: VALUES

I. Mark each value as ✓ Must Have (essential), — Nice to have (Important but not critical) or ✗ Not Important

II. Highlight Your Top 3 (✓) Must Have Values; note any (⊗) Dealbreakers (things to avoid)

Value	Description	✓ — ✗	My notes
Achievement / Impact	Producing tangible results; excelling; feeling needed.		
Affiliation / Community	Being part of a group with shared interests and goals.		
Autonomy / Independence	Working on my own terms, being self-directed		
Challenge / Engagement	Staying mentally stimulated, solving problems		
Compensation / Financial Stability	Earning an income or benefits		
Creativity / Expression	Having originality and artistic opportunities in my work		
Environment / Work Setting	Working in a preferred location (office, home, outdoors, etc.)		
Flexibility / Work-Life Balance	Controlling my schedule and workload		
Helping Others / Nurturing	Supporting, mentoring, or sustaining others		
Influence / Leadership	Making an impact, shaping decisions		
Learning / Growth	Gaining new skills, continuing education		
Legacy	Leaving a lasting impact for future generations		
Mentorship	Coaching and inspiring others		
Novelty / Adventure	Experiencing new challenges or risks		
Order / Organization	Preferring structured, planned work		
Purpose / Meaning	Aligning work with my personal values and ethics		
Recognition / Appreciation	Being valued for my contributions		
Social Responsibility	Giving back, contributing to a cause or solving a social problem.		
Spirituality / Inner Growth	Seeking work that aligns with personal beliefs, mindfulness, or deeper purpose		
Stability / Security	Working in a reliable, predictable environment		
Status / Reputation	Maintaining prestige or professional influence		
Wellness / Well-being	Health, stress levels, and overall life balance		