



Join the retirement parade  
from a new angle

# RETIREMENT LIFE PLANNING

## ABSTRACT

A work document to assist the retiree to chart his/her own life goals and then put actual financial to the life goals. This will assist towards a meaningful life after retirement.

Part of the Dragon Wealth Financial Planning Process

## SESSION 1

### LIFE PLANNING

#### INTRODUCTION

This section is called career planning because your career does not end when you retire from your current job. Your career should not just be a job for the sake of an income. It should be a vocation. In other words, you should engage in a meaningful trade to ensure that you have a happy and fulfilling life. Just to say that you will keep busy after retirement is not enough. That is for sure a death sentence. How you are busy is even more important than the fact that you are busy.

Follow the steps below. Dream big. Then determine the cost to live that dream. And, finally set goals to achieve it.

#### RETIREMENT CAREER PLANNING

After retiring from your current work. What are you planning to do? Please select 1 below:

Stop my current career completely and live off my retirement savings	
Scaling down on my current career and live partly from my retirement savings	
Continue working with current salary	
Stop my current career completely and start a new career	

If you should consider a new career; what will it be? \_\_\_\_\_

What is preventing you from taking the step? \_\_\_\_\_

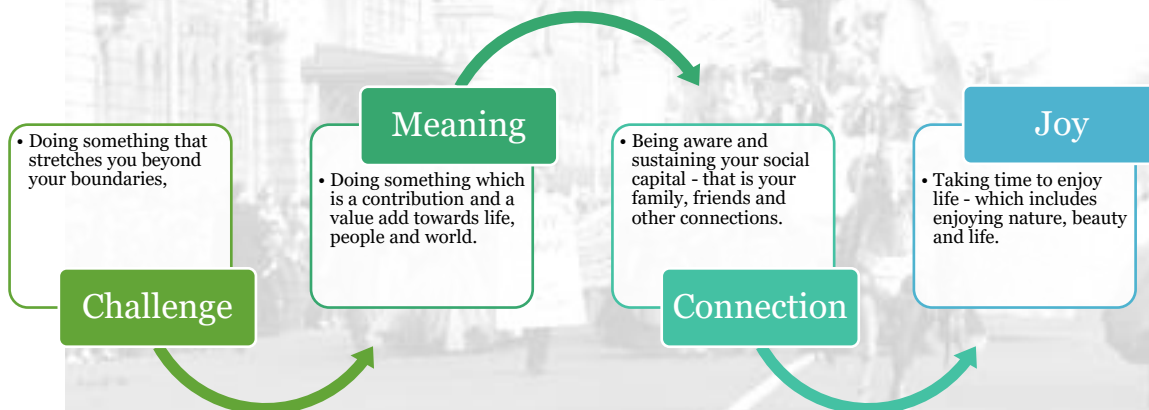
With how much of the four principles in the next section will your new career adhere too? \_\_\_\_\_

How much will the start-up cost you? \_\_\_\_\_

What will the monthly average income be? \_\_\_\_\_

#### MEANINGFUL RETIREMENT

The Rhythm of a meaningful life: This is how you should be busy after retirement (even in life before retirement).



## Challenge

How will you be challenged...?

The next 5 years \_\_\_\_\_

\_\_\_\_\_

Estimated Cost: \_\_\_\_\_

The next 10 years \_\_\_\_\_

\_\_\_\_\_

Estimated Cost: \_\_\_\_\_

## Meaning

How will you make a meaningful contribution...?

The next 5 years \_\_\_\_\_

\_\_\_\_\_

The next 10 years \_\_\_\_\_

\_\_\_\_\_

Estimated Cost: \_\_\_\_\_

## Connection

My social capital is:

Family \_\_\_\_\_

\_\_\_\_\_

Friends \_\_\_\_\_

\_\_\_\_\_

How do I plan to sustain my Social Capital: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estimated Cost: \_\_\_\_\_

## Joy

What makes me happy..?

Things that costs no or little money: \_\_\_\_\_

\_\_\_\_\_

Things that will cost money: \_\_\_\_\_

\_\_\_\_\_

How do I plan to have a joyous routine: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estimated Cost: \_\_\_\_\_


Total Cost: \_\_\_\_\_

### PUTTING IT ALL TOGETHER

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Your lifestyle cost per month will be? \_\_\_\_\_ (adding all the costs in the previous sections together)

Your income from your career/ new career will be? \_\_\_\_\_ (Excluding Retirement Savings)



**MONEY FOLLOWS LIFE: FIRST  
DETERMINE WHAT YOU WANT TO DO  
WITH YOUR LIFE, THEN DETERMINE  
THE COST AND WORK TO ACHIEVE  
YOUR LIFE AND MONEY GOALS.**

Dragon Wealth Philosophy

