Retirement DIMENSIONS™

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Redefining the Next Chapter in Your Life

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Retirement Dimensions™: Redefining the Next Chapter in Your Life will help you to more clearly understand who you are and what you want to genuinely embrace in this important stage of your life.

This report has been designed to remind you of your values, personal strengths, concerns, interests, relationship preferences, and philosophical views as reflected in your responses to the Retirement Dimensions™ instrument. It interprets your preferences with profiles of four personality temperaments, one of which will be most like you, and the other three respectively will be a lot like you, somewhat like you, or least like you. Your personal blend of these four personality temperaments provides relevant information to help you move forward positively in your new phase of life.

On the next page, you will find your own Retirement Dimensions™. Use your preferences and personality blend as discussion points with people who are important in your life to develop a greater understanding and appreciation for one another. Recognizing how you are similar to and where you are different from others can enhance your relationships as you continue your life's journey.

Retirement Dimensions™ is not intended to pigeonhole or label you. Rather, it recognizes that we are all a blend of all four personality styles, with one being your most preferred, others less preferred and one least preferred. This blend of personality temperaments is referred to as your "plaid" - your unique character.

Consider the sample activities as a "spark" for further ideas. Redefine this new role by exploring more areas of your personality blend. Expand your horizons. Try new things. Enjoy redefining your next chapter!

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My Retirement DIMENSIONS™

	Inquiring Green	Organized Gold	Authentic Blue	Resourceful Orange
My Values	2	4	2	1
My Personal Strengths	2	2	1	4
My Worries	3	1	2	3
I'm Really Looking Forward to Doing	1	3	4	2
Important Relationships	2	2	4	1
My Life's Philosophy	4	2	1	3
Having the Time, I Will	4	3	1	2
FINAL SCORE	18	17	15	16

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Your highest score is your preferred style, your lowest score is your least preferred style.

My Preferred Style	My Secondary Style	My Third Style	My Shadow / Least Preferred Style
Inquiring Green	Organized Gold	Resourceful Orange	Authentic Blue

Extraversion | Introversion

Inquiring Green

Your core needs are knowledge, competence, and innovation. You need to understand “why?” and like finding answers and solutions on your own. In retirement, therefore, you will find satisfaction in furthering your intellectual understanding of existing concepts, or exploring new concepts, systems, or technology. You enjoy visioning, examining, and clarifying ideas.

As an Inquiring Green, you value intellectual challenges and enjoy strategizing. You need to seek the core or root of complexities and likely will take a global view while continuing to develop ideas that are different and unusual. You are passionate about searching out information and can easily lose track of time. You need quiet time to think and process the information you have accumulated. Because of your preference to be independent you may need to place limits on the time spent investigating on your own in order to seek out like-minded individuals for socialization; this will assist you in finding the balance you want in your retirement.

In retirement you will continue to gather the latest financial data and information to enable you to make informed decisions regarding your financial security. However, you will tend to postpone making financial decisions if you think that you do not have enough information.

You appear to others as a “deep thinker” and possess a dry wit that leans towards cynicism at times. People are impressed by your ability to recall long-forgotten jokes.

In relationships you value logic and objectivity which allow you to set your emotions aside. You show you care by spending time with those close to you and also spending time observing the interactions of others. You continue to place high expectations on your relationships and need to be with people you respect. At this stage in your life, you may enjoy researching areas of interest; whether it is traveling to other countries, and investigating their histories and cultures, or becoming involved as a volunteer in local community groups where your expertise in analysis, mentoring skills, and contributions are recognized and appreciated.

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Sample Activities for Inquiring Green

Work and Volunteer Activities:

- Work part-time, contract, casual or season – in your field of expertise where your knowledge is appreciated
- Consult in an industry you know
- Continue your professional affiliations, providing continuity, updating data and updated information, or writing manuals
- Attend professionally affiliated conferences or other functions in areas of interest
- Volunteer on a board in the capacity of a strategist, analyzer or problem-solver, (e.g., municipal, professional association, hospitals, etc.)
- Volunteer as a mentor or instructor
- Volunteer at a local museum

Individual and Group Activities:

- Play bridge or other challenging games
- Work on a degree in a field of interest
- Take a course or study an area of interest
- Learn a new language
- Learn a new skill
- Write a book
- Invent something

Sports:

- Involve yourself in individual sports (e.g., biking, walking, running, skiing) or team sports (e.g., Master's sport events, golf, curling)

Hobbies:

- Research countries and cultures
- Read journals, books, articles
- Watch documentaries
- Make your own wine or beer
- Design and maintain a website

Explore one or more sample activities from each of the other three colours. Find balance by trying activities that are community service oriented, imaginative or spiritual, playful or fun.

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Organized Gold

Your core need is to belong through membership in a family, interest group, or community. In retirement, therefore, you find satisfaction in being of service to an organization you believe in. This may be a group that provides help to people in your community, or in the global arena, or it may mean taking a more active role in your family. Your need to feel useful and make a contribution may lead you to continue to do paid work in some fashion or to volunteer on committees or boards where your natural talents for planning, organizing, coordinating and stabilizing will be a strength.

As an Organized Gold, you value stability, structure, and a predictable routine. As you retire, you need to create your own daily and weekly routine including a number of regularly scheduled activities. You will enjoy joining a fitness group or other groups that share your interests. Because you find it difficult to relax until you complete a commitment, you may want to consider limiting the number of your commitments in order to create the balance you want in retirement.

The security and stability you have valued all your life now play out in wanting to continue to save money for a rainy day. Therefore you may find it difficult to spend money on yourself or on things that may seem frivolous until you are sure you can meet your financial obligations now and in the future.

Being responsible, you appear serious to others but you enjoy a good laugh like everyone else, though you usually prefer to have others tell the jokes.

In relationships, you value loyalty, trust and respect. You show you care by performing acts of service for your loved ones. As an Organized Gold, you take the lead in maintaining family traditions by honouring ceremonies and rituals established in the past or starting new ones. At this stage of life, you might enjoy collecting and organizing information on your family history and/or other areas of interest.

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Sample Activities for Organized Gold

Work and Volunteer Activities:

- Do record keeping, budgeting, accounting, or tax preparation for yourself and/or others
- Continue in professional affiliations
- Volunteer for community service organizations
- Volunteer at a local library or museum
- Provide security through involvement with programs such as neighbourhood watch, the police, or a fraud prevention program
- Help others to read and write through a school or community literacy program
- Help newcomers settle by providing information on community resources
- Drive a school or accessibility bus

Individual and Group Activities:

- Join groups that share common interests (e.g., a service club, faith community, band, choir, book club)
- Collect and organize information on your family history and/or other areas of interest
- Plan and coordinate events for family and friends

Sports:

- Join a fitness group (e.g., hiking club, Tai Chi, yoga, dancing, curling, or skiing group)

Hobbies:

- Stay current and discuss current events with others
- Contact a local art group and learn a new craft (e.g., painting, woodworking, spinning)

Explore one or more sample activities from each of the other three colours. In retirement, find balance by trying activities that are imaginative or spiritual, playful or fun, or that allow you to learn a new skill or study an area of interest.

SAMPLE

Resourceful Orange



Your core need is to have the freedom to make your own choices. You want to do it your way. In retirement, therefore, you will find satisfaction in roles where your innovative, quick-acting, adaptable nature is a strength. You live in the moment and like to make it up as you go. Your ability to observe, assess, and come to a quick decision makes you a great troubleshooter in many situations.

As a Resourceful Orange, you value instant, fast-paced action. You are motivated by short-term projects with concrete results. If there is a competition or challenge involved, then it is even more enticing. You likely have a variety of skills and interests, which you enjoy pursuing alone or utilizing as a basis for your friendships. When retired, you will find life an adventure in which you enjoy taking calculated risks. Whether you are involved in paid or unpaid work you will bring some fun-loving spontaneity to the role. Because having rules for the sake of rules is your biggest stressor, know that to have a fulfilling retirement you need to be involved in activities that allow your optimistic, easy-going style a measure of free rein.

Since you love change and live for the now, you might be tempted to make purchases on impulse. You find it fun to splurge, and enjoy being generous, often buying gifts for others. You only live once, and you would like to have the financial freedom to live life to the fullest.

Being someone with a quick wit you enjoy fast-paced zingers. You laugh at outrageous situations, appreciate improvisation, and find original humour entertaining. You tend to be the one who impulsively tells jokes and funny anecdotes.

While you base friendships on common interests, you also choose to be around people who are fun and spontaneous. You may express your love of special people through surprise gifts and actions. At this stage of life, you would enjoy a spur-of-the-moment activity such as deciding today to make a day trip to see one of your many friends or taking a last-minute trip to somewhere new and exciting.

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Sample Activities for Resourceful Orange

Work and Volunteer Activities:

- Promote events or sell products you enjoy
- Perform at a comedy venue or improv theatre
- Become a mystery shopper
- Drive rented, sold or leased vehicles to new locations
- Take your pet to visit seniors in retirement homes
- Do handyperson jobs to allow seniors to stay in their own homes
- Play or sing in a musical group
- Build props or scenery for theatre

Individual and Group Activities:

- Throw surprise or spontaneous parties for friends and family members
- Negotiate with others for the best deals
- Adventure travel; hike, fish, ski, metal detect, or other outdoor pursuits
- Build lawn furniture and ornaments
- Renovate or redecorate your own home

Sports:

- Drive an ATV, snowmobile, motorcycle or race car

Hobbies:

- Try new foods and new restaurants
- Write a blog to stay in touch with your family and friends
- Do hands-on activities (e.g., woodworking, glass blowing, stained glass, crafts, cooking, gardening, wine making, picture framing, pottery, model railroading)

Explore one or more sample activities from each of the other three colours. In retirement, find balance by trying activities that are community service orientated, imaginative or spiritual, or that allow you to learn a new skill or study an area of interest.

SAMPLE

Authentic Blue

Your core needs are relationships and finding the meaning and significance that comes from having a purpose in life. In retirement, therefore, you will find satisfaction in getting involved with causes, things that hold a great deal of meaning to you — either globally and/or locally - in roles where your warm, enthusiastic, honest, and genuine nature are a strength. While you want to help make this a better world in which to live, you also enjoy taking time for the little everyday things that you find so fulfilling

As an Authentic Blue you value maximizing human potential - yours and that of others. When retired, you will enjoy being involved in activities that allow you to stretch and grow to be the best you can be, while also inspiring and motivating family, friends, and others to do the same. You will enjoy paid or unpaid work that provides opportunities for you to contribute as an imaginative, intuitive optimist. But, because guilt is your biggest stressor, be assured that to have an enjoyable retirement, you are not obligated or expected to fix everything in your world.

Since you empathize with, and are very sensitive to the needs of others, you will be tempted to make financial contributions to many worthwhile causes and find it difficult to choose among so many demands. You find it more difficult to spend money on yourself than on those whom you feel need money more than you do.

Being someone who works at creating harmony, you may appear to be too nice, but you enjoy poking fun at yourself a little, and will sometimes tell humorous stories, often at your own expense.

You are a “people” person. Having good relationships is vital to your enjoyment. As a natural nurturer, you take the lead in creating harmony within your family and with your friends. In fact, you often put the needs of others ahead of your own as your way of showing support and encouragement. At this stage of life, you enjoy having the time to meet your friends’ and family members’ needs – whether large or small.

SAMPLE

Sample Activities for Authentic Blue

Work and Volunteer Activities:

- Become a motivational speaker
- Volunteer at the paediatrics or geriatric units at a hospital, a senior's home or community for the disabled
- Help furnish a shelter in your community
- Fundraise for refugees in a third-world country
- Mentor youth on a one-to-one basis or volunteer on a hotline
- Support the arts by joining a board of directors or fundraising committee
- Volunteer at a youth program

Individual and Group Activities:

- Learn a new language
- Have long leisurely lunches with special friends and/or family members
- Help family members (e.g., take care of a grandchild for a day)
- Attend the milestones of your family and friends – whether small (e.g., kindergarten graduation, recitals, soccer games) or major (e.g., university graduation, finales)
- Visit family and friends who are unable to get out
- Join a spiritual group or become more active in one in which you are already involved

Sports:

- Do yoga or Tai chi or some other non-competitive activity that will help you improve your well-being

Hobbies:

- Read books that bring you joy
- Go for walks in natural areas to appreciate the scenery, plants, and animals
- Photograph, paint, or draw the things you admire

Explore one or more sample activities from each of the other three colours. Find balance by trying activities that are playful and fun, ones that allow you to learn a new skill or study an area of interest, or ones that are of service to the community.

SAMPLE

Next Steps

Any one of the four profiles may accurately describe your preferences as they apply in one specific aspect of your life (i.e., your home and family life, your leisure life, your learning life, or your work life).

List typical times or roles when you are:

Inquiring Green _____

Organized Gold _____

Authentic Blue _____

Resourceful Orange _____

Research indicates that you will stay true to your preferred temperament throughout life but that you may develop other parts of your temperament through new life experiences. At this stage of life there may be aspects of your temperament blend that you would like to explore or further develop. You can refer to the activities in the four profiles for sample ideas.

List times or roles in life that you would like to explore being:

Inquiring Green _____

Organized Gold _____

Authentic Blue _____

Resourceful Orange _____

SAMPLE

Introversion/Extraversion

An element of personality theory that is not actually a part of temperament theory but is critically important to understanding ourselves and others is the preference for Introversion or Extraversion. To be truly effective in understanding and communicating with others, we also need to be aware of this element. What the Extravert says out loud is not necessarily their final decision. They are just throwing it out there as it comes to mind. Introverts, when quiet and non-communicative, are not necessarily disinterested... they may simply be taking in and processing what they are hearing. Give them some time and then ask for their input, then be prepared to be surprised at their insights.

Introversion and Extraversion impacts all four dimensions, especially with respect to communication. Within Personality Dimensions®, the terms “introversion” and “extraversion” are not intended to mean “shy” or “outgoing.” Rather, following Jungian definitions, the terms describe how people are energized. Introverts gain energy from within themselves through having quiet time for inward reflection. Extraverts, on the other hand, gain energy from people, places, and things outside themselves, often through engaging in activities with others.

How does this translate into every-day activities when retired? Introverts may choose to stay at home quietly reading, writing, and reflecting, or spending time with a close circle of friends and family. Extraverts may choose activities where they can interact with others in a variety of situations.

While Introverts typically prefer to do much of their thinking and planning through quiet and independent research and reflection, Extraverts tend to enjoy discussing and sharing ideas with others. However, Introversion and Extraversion are not measures of social skills. Introverts are often warm and engaging individuals who enjoy interacting with others; they simply may need to gather their energy before social events and then arrange for quiet time afterwards to re-energize. Similarly, some Extraverts may seem reserved and somewhat shy at first meeting, but will likely draw energy from their interactions with others and become more actively engaged as the day goes on.

Remember, we can and do function from all perspectives, but some require less effort and will feel more comfortable than others, and this is different for each person.

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Moving Forward

Once you have decided upon some activities to explore you can move forward by putting some plans in place. The following Goal Planning Table will help you organize the steps and time needed to move forward with your next chapter, such as:

- Talking to experienced people
- Creating a budget
- Getting financial advice
- Obtaining items, information, or training to perform the activities

Example 1:

Goal: *Hike the Bruce Trail*

Task	People or resources needed	Duration	Estimated completion date
Short-term (next three months)			
Check out the trail.	*Talk to past hikers and purchase maps.*	*1 day*	*June*
Mid-term (within the next 12 months)			
Do a practice hike in order to plan 7-day route.	*Visit local Bruce Trail Club and trails.*	*2 days*	*July*
Long-term (more than 1 year)			
Prepare equipment and start hike.	*Purchase equipment.*	*2 months*	*September*

SAMPLE

Example 2:

Goal: *Start a Hobby Business*

Task	People or resources needed	Duration	Estimated completion date
Short-term (next three months)			
Explore self-employment.	*Talk to business owner about advantages and disadvantages of self-employment.*	*1/2 day*	*September 15th*
Mid-term (within the next 12 months)			
Create financial plan.	*Talk to financial advisor.*	*1 evening*	*Sometime in October*
Long-term (more than 1 year)			
Start part-time business.	*Set up work room and office.*	*3 months*	*When I stop full-time work next year.*

Remember: Plans are only your best estimate and perhaps you will not meet all completion dates. Make a point of reviewing and revising your plans with new tasks and dates.

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Following the examples on the previous pages use the following Goal Planning Table to help you map out the short, mid, and long-term steps to help you achieve one of your retirement goals.

Goal:

Task	People or resources needed	Duration	Estimated completion date
Short-term (next three months)			
Mid-term (within the next 12 months)			
Long-term (more than 1 year)			

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Tips to Remember

Differences are desirable!

One style is not better or more valued than another. Retirement Dimensions™ can help you to develop an appreciation and understanding of your unique blend of character traits and of those close to you. Use it as the basis for understanding and discussion, then follow up by gathering information through reading, talking to others, and trying those options that are most intriguing to you.

Retirement Dimensions™ can help you manage this next chapter in your life – as you redefine your retirement – so that it will be the most satisfying and fulfilling time of your life!

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