

Vision

Exercise

Envision a retirement with greater financial confidence. A retirement with the goal of feeling more confident about your savings and living the retirement you envision.

We refer to the first 10-15 years as the “Go-Go Years.” Let's begin by picturing how you'll embrace this vibrant and exciting chapter.

Step 1

Get a pen and a notepad. Set the timer for 10 minutes.

Imagine your perfect weekend in retirement. Not your entire retirement—just those ideal, blissful weekends. Think about what would truly make you happy and relaxed. If you have a significant other, focus on your own dream weekend first. Once you've each had time to reflect, share your visions over a cozy date night. This could lead to some inspiring ideas for both of you.

Prompts to get you started:

- Where are you spending your weekend?
- What are you doing?
- Who are you with?
- How do you feel?



Now: Close Your Eyes

Picture that weekend. Really let yourself sink into the vibe of that moment. Now, grab your pen and start writing! For the next 10 minutes, just let it flow—don't stop, even for a second. And if you're still writing when the timer ends, keep going as long as you need.

Don't stress about spelling or grammar. Just let your thoughts spill onto the paper exactly as they come. This is all about capturing your ideas as they are—real and unfiltered.

Writing it down
makes it more real

Consider: Why did we ask you to do this exercise?

Because your financial plan starts not with finances but with what you want your money to accomplish, to determine *what it was all for*. We want to create a specific plan that helps you achieve your vision

