FROM TRANSITION TO LEGACY

Reclaiming Purpose and Telling Your Story in Retirement

TRANSITION → PURPOSE → LEGACY

Retirement Is More Than an Event

Retirement may happen on a particular date. **Transition takes time.**

Leaving a career can change more than employment. It can change our sense of identity, daily structure, community, and purpose.

IDENTITY	STRUCTURE	COMMUNITY	PURPOSE

Financial preparation matters. The human side of retirement asks additional questions:

- Who am I when the position is gone?
- What will give my days meaning?
- Where will I find connection and community?
- How do I want to continue contributing?
- What do I want to preserve and pass on?

Wear Two Hats Today

PERSONAL	ORGANIZATIONAL
What does Transition → Purpose → Legacy mean in my own life?	How could my organization help people navigate these phases before and after retirement?

Preparing for retirement is about more than money.

Composition Book Prompt

Where am I now — Transition, Purpose, Legacy, or somewhere between them? Why?

YOUR PERSONAL JOURNEY

1. TRANSITION | *Preparing for Change*

Retirement asks us to consider not only what we are leaving, but what we are moving toward.

Think about: Identity • Structure • Community • Purpose

Something I have left — or will leave — behind is…

_____

Something I want to carry forward is…

_____

2. PURPOSE | *Building the Next Chapter*

Purpose does not have to mean beginning another career. It may be expressed through serving, teaching, mentoring, creating, learning, writing, connecting, advocating, or leading.

Something I still care deeply about is…

_____

One way I could use my experience in this next chapter is…

_____

Your position can end. Your usefulness does not.

3. LEGACY | *Preserving What Matters*

Legacy includes the experiences, wisdom, and stories we choose to preserve and share.

MEMORY	STORY	LEGACY
What happened?	How did I experience it?	Why does it matter now?

Begin with one: Person • Place • Decision • Challenge • Turning Point

One memory I want to preserve is…

_____

Why has this memory stayed with me?

_____

You do not have to begin with a book. Begin with one story.

TAKE IT BACK TO YOUR ORGANIZATION

How can your organization support the whole retirement journey?

TRANSITION Preparing for Change	PURPOSE Building the Next Chapter	LEGACY Preserving & Contributing
Pre-retirement human-side workshops	Purpose workshops	Story-writing groups
Identity beyond the title	Mentoring opportunities	Oral-history projects
Social connection planning	Member-led learning	Institutional memory projects
Peer conversations with recent retirees	Skills-to-service opportunities	Three-Story projects
Introduce the retirement organization before retirement	Volunteer/service connections	Intergenerational storytelling
Retirement transition groups	Connection circles	Faculty wisdom projects
Planning new routines	Encore contribution	Annual story collections

Look at Your Organization

What are we already doing well?

Where is there a gap?

Which phase needs more attention? ☐ Transition ☐ Purpose ☐ Legacy

One idea I want to take home:

Who should I talk with about this?

What is one first step we could take?

DON'T WAIT UNTIL RETIREMENT TO BEGIN THE RELATIONSHIP.

Pre-retirement programming can become a bridge between the university community people know and the retirement community they are about to enter.

What Will You Do Next?

FOR YOURSELF

☐ Explore a new source of purpose
☐ Strengthen an important connection
☐ Mentor or serve
☐ Begin writing one story
☐ Preserve a meaningful memory
☐ Take another step: _____

FOR YOUR ORGANIZATION

☐ Start a conversation about pre-retirement programming
☐ Explore a Transition → Purpose → Legacy series
☐ Create a purpose or connection activity
☐ Begin a member story project
☐ Explore mentoring or intergenerational programming
☐ Share this guide with organizational leadership

My Commitment

One thing I will do when I return home is:

_____
_____
_____

Your career may be complete.
Your contribution is not.
Your story still matters.

Continue the Conversation

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