



Retirement Rules

OF THE ROAD

GUIDED PLANNER

Visions, Goals, and Dreams Planner

The pursuit of living an extraordinary life on your own terms, and beyond your wildest imagination, with confidence, freedom and independence.

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Discover the Life You Want to Live and Start Living It!

The process of formalizing your visions, goals and dreams is the first step in designing, creating and living the life you want to live. Get crystal clear on what matters most and focus on turning your desires into reality. Your answers to the following questions will build the foundation for where you are today and will continue to evolve in the future.

Relax, find some quiet time for thought and let your imagination run free. These are the exact types of questions to be asking and answering right now. Tap into the confidence, freedom and independence that comes with the pursuit of living an extraordinary life on your own terms and beyond your wildest imagination. You can do it, and it's easier than you think.

"To begin with the end in mind means to start with a clear understanding of your destination. It means to know where you're going so that you better understand where you are now and so that the steps you take are always in the right direction. How different our lives are when we really know what is deeply important to us, and, keeping that picture in mind, we manage ourselves each day to be and to do what really matters most."

— Stephen Covey, *The 7 Habits of Highly Effective People*



Imagine this: You're on your way to meet a friend at your favorite outdoor restaurant. The sun is shining, you're smiling, glowing with excitement and have an extra bounce in your step. It's the perfect temperature and the perfect day. You round the corner and see your friend waving and returning your same glow. You greet each other and embrace each other and sit down. Your friend asks, "How's life?" You smile and respond confidently that you're living an extraordinary life beyond your wildest imagination. Your friend smiles back and says, "Tell me more." How do you respond?

Who are the most important people or animals in your life?

What matters most to you?



When are you the happiest and what are you doing?

Where would you live if you could live anywhere?

How could you make your current work more meaningful, enjoyable and flexible?

If you could choose any career, what would it be?



What are your favorite recreational activities?

What is on your "Bucket List"?

What would you like to accomplish in the next 0–10 years?

What would you like to accomplish in the next 10–20 years?



What would you like to accomplish in the next 20+ years?

How would you rather be spending your time, money and resources right now?

What would a work-optional or retirement lifestyle look and feel like over an extended period of time?

What would your ideal day be from waking up to going to bed?



What would you attempt to create for yourself if you knew you would be totally okay with the outcome?

What do you most look forward to?

If yourself 10 years from now could give you advice today, what would it be?

What are the most important traits you enjoy from people in your inner circle?



What subjects, current events or causes are you most passionate about?

What keeps you up at night, financial or otherwise?

What would you like your legacy to be?

Please add any additional thoughts you have:



SAFE TRAVELS

This planner is yours to revisit, again and again, as your vision for the road ahead continues to evolve.

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