



# Retirement Transition Wheel®

## Instructions:

1. To establish a baseline for where you are in 12 key areas of a successful retirement transition, please select your level of comfort or satisfaction for each area.

**7= Highest level of satisfaction and/or comfort**

**1= Lowest level of satisfaction and/or comfort**

2. Once complete, connect the numbers in each category to complete the formation of a wheel. The larger and rounder the wheel, the more prepared you are for making the transition.

3. If your wheel appears and feels a little lopsided, consider which areas are going well that you want to lean into and which areas you want to address and take action on.

