

Values and Needs Assessment

The following is adapted from Robyn Ryan, who is a career counsellor in the United States¹. Robyn suggests that “our values change over time” (p. 42) and we suggest that our needs change over time too. The following is intended to help you determine what matters most to you at this stage in your life, especially as you think about planning your next life stage: retirement. Review the values and needs listed below and **circle the five most important for living a life you will love in retirement**:

| | | |
|-----------------------------------|--------------------------------|-------------------------|
| Acquiring new knowledge | Feeling of personal self-worth | Personal growth |
| Adventure | Flexibility | Physical work/activity |
| Advocacy | Freedom from | Power and influence |
| Being successful at whatever I do | pressure and stress | Producing something new |
| Being spontaneous | Friendships | Recognition |
| Being your own boss | Growing/harvesting | Relax & take it easy |
| Caring for family members | Helping others | Security |
| Caring for animals | Learning a new skill | Self-development |
| Challenging ‘work’ | Learning more about myself | Starting a business |
| Developing a legacy | Keeping busy | Supervising others |
| Doing lots of different things | Making a difference | Teaching others |
| Doing something meaningful | Meeting new people | Travel |
| Earning extra income | Mentoring | Using my mind |
| | More time with family | Using my creativity |
| | Outdoor work | Working from home |
| | Part-time work | Working with others |
| | Peacefulness | Other: _____ |
| | | _____ |

¹ Ryan, R. (2018). *Retirement reinvention: Making your next act your best act*. New York, NY: Penguin Books.

List your top 5 values/needs from the previous page below. Beside each, brainstorm possibilities for the things you can be doing in your retirement to meet these needs.

| Priority Values & Needs | Possibilities for Action |
|------------------------------------|---------------------------------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |