



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