



## Values and Needs Self-Assessment

The following self-assessment worksheet is adapted from Robyn Ryan, who is a career counsellor in the United States<sup>1</sup>. She suggests that our values change over time and I 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:**

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

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

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.

<b>Priority Values &amp; Needs</b>	<b>Possibilities for Action</b>
1.	
2.	
3.	
4.	
5.	

