

Retirement Roadmap Reflection

Private Purpose Pathfinder for Your Next Chapter

From Uncertainty to Unshakable Direction

*Take a breath. Answer truthfully.
This stays between you and your future.*

TIMOTHY TAN

LEGACY TRUTH MIRROR

Before you move forward, pause.
On a scale of 1–10, rate the following:

1 = Strongly Disagree

10 = Strongly Agree

Rate 1-10 (circle one) + One Micro-Action

I feel clear about my purpose this season.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

My days feel meaningful and intentional.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

I feel energized about the next decade.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

My identity feels secure beyond my career.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

My spouse and I align on retirement vision.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

I feel needed and useful daily.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

I have clear contribution channels now.

1 2 3 4 5 6 7 8 9 10

Micro-action today:

Total Score: ___/70

Anything below 35? Your BLUE Phoenix rising starts now.

What Shifted?

Retirement reshapes more than your calendar—it rewires your identity, relationships, and rhythm.

Complete these unfiltered truths (one sentence each):

The career piece I miss most:

The part I celebrate escaping:

Since retiring (or prepping), I've noticed:

The feeling I've kept silent:

My deepest fear this season:

IDENTITY BEYOND THE TITLE

For decades, your title defined you. Now, strip it away—who emerges?

In one raw paragraph, describe your core self today
(no titles, roles, or achievements):

If that felt hard, name the block:

THE DAWN DIRECTION TEST

FAST-FORWARD 2 YEARS.

YOUR MORNING REVEALS YOUR LEGACY TRAJECTORY.

YOU WAKE UP FEELING:

☐ **ENERGIZED**

☐ **NEUTRAL**

☐ **RESTLESS**

☐ **DIRECTIONLESS**

☐ **PEACEFUL**

☐ **DRIVEN.**

WHY? (ONE SENTENCE):

***WHAT MUST SHIFT FOR DAILY ENERGIZED MORNINGS?
(THREE MICRO-CHANGES):***

CONTRIBUTION AUDIT

ANSWER HONESTLY.
YOUR FUTURE LEGACY DEPENDS ON THESE TRUTHS.

WHO BENEFITS MOST FROM MY EXPERIENCE RIGHT NOW?

(Name individuals, groups, or communities starving for your specific wisdom.)

WHERE COULD MY WISDOM PREVENT SOMEONE ELSE'S MISTAKE?

(Pinpoint the blind spots - retirement drift, legacy voids, faith-family tensions - you've conquered.)

IF I COMMITTED 5-10 HOURS PER WEEK TO MEANINGFUL CONTRIBUTION, I WOULD:

(Be brutally specific: mentor 3 high-net-worth retirees via Zoom? Craft weekly Substack audits? Launch a BLUE Phoenix micro-cohort?)

WHAT RESPONSIBILITY STILL ENERGIZES ME?

(The one task that lights your fire, not drains it - coaching faith-first legacies? Curating travel photography for purpose-driven stories?)

WHAT WOULD FEEL LIKE A WASTE OF MY REMAINING DECADES?

(Scrolls without strategy. Comfort without courage. Wisdom hoarded, not hurled into the world.)

MARRIAGE & ALIGNMENT

*(Optional if applicable. Skip if single/divorced/widowed.
High-capacity unions thrive on candor.)*

REFLECT HONESTLY WITH YOUR SPOUSE - OR SOLO, THEN SHARE.

HAVE WE CLEARLY DEFINED WHAT THIS NEXT CHAPTER LOOKS LIKE TOGETHER?

☐ **YES**

☐ **SOMEWHAT**

☐ **NOT REALLY**

*(Rate it. If "Somewhat/Not really,"
Schedule a 30-minute Legacy Date this week.)*

ONE EXPECTATION I HAVE THAT MY SPOUSE MAY NOT FULLY KNOW:

*(e.g., Weekly faith reflections together. Monthly travel scouting for cultural resets.
Dedicated coaching nights without interruptions.)*

ONE EXPECTATION MY SPOUSE MAY HAVE THAT I HAVEN'T FULLY CONSIDERED:

(e.g., More presence over productivity. Shared volunteering in faith communities. Adventure dates blending your photography passion with their hidden dreams.)

THE LEGACY QUESTION

ANSWER WITH RAW HONESTY. AT 85, PLATITUDES WON'T COMFORT;
UN-LIVED TRUTHS WILL.

IF I LOOK BACK AT AGE 85, I WOULD REGRET NOT:

(e.g., Mentoring 100 retirees through faith-first reinvention. Publishing the BLUE Phoenix poetry that immortalizes our family's grace. Capturing 52 cultural destinations on Leica, each frame a legacy lesson for my children.)

THE LEGACY I WANT TO BUILD IS NOT ABOUT MONEY. IT IS ABOUT:

(e.g., Igniting purpose in high-net-worth souls adrift—through AI-optimized coaching, Substack fire, and lived faith that my kids remember as "Papa who put God first, loved fiercely, and blazed trails.")

PAUSE BEFORE YOU MOVE ON

IF SEVERAL ANSWERS FELT UNCERTAIN, HEAVY, OR INCOMPLETE
- THAT'S NOT WEAKNESS.

IT'S AWARENESS.

AND AWARENESS IS THE SPARK OF INTENTIONAL DESIGN.

THE FIRST CHAPTER OF RISING FROM THE ASHES LIKE A BLUE
PHOENIX OPENS THIS CONVERSATION.

THIS ROADMAP REFLECTION DEEPENS IT.

READY FOR GUIDED CLARITY?

BOOK A 30-MINUTE COMPLIMENTARY CRYSTAL CLEAR CLARITY
CALL TO MAP YOUR NEXT CHAPTER WITH PRECISION.

LINK: [TINYURL.COM/CCCS3223](https://tinyurl.com/cccs3223)

(LIMITED SPOTS - CLAIM YOURS BEFORE THEY FILL.)

**Book Your COMPLIMENTARY
Crystal Clear Clarity Call (\$497 Value)**

CLICK HERE 

*Because retirement isn't about slowing down.
It's about rising intentionally.*

Timothy Tan

AI-Optimised Cognitive Legacy Coach I
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