

# Dear Coach

What are your career aspirations? How are you going to reach those goals? This column will guide you to a new career stage. //

## **T+D WANTS YOUR STORY!**

T+D is looking for workplace learning and performance professionals to contribute to this column. Are you anticipating a move into e-learning? Are you a recent graduate who wants to become a designer, presenter, or trainer? Are you a corporate trainer transitioning to consultant or entrepreneur?

We want to hear about your aspirations and help you with the challenges you face in your pursuit of those goals. Send your career path story to [mailbox@astd.org](mailto:mailbox@astd.org).

## *Dear Coach*

**My career spans three decades already. I'm one of the 64 million U.S. workers who will be eligible for retirement by 2010. I've met several of my personal career goals—to direct the learning function in a large organization, to work outside the United States, and to implement programs that I could prove had an impact on the bottom line.**

But I'm convinced that there is more to this profession than I've experienced so far. I believe that helping people develop is one of the keys to improving society at the individual and organizational levels. While I'm still relatively young—I'm in my late 50s—I want to be sure I set myself on a path to keep working after I retire officially. My primary goals are to stay engaged, to keep learning, and to give something back to society.

I have a pretty broad set of skills, having done everything from instructional

design to competency modeling to implementing a major LMS to offering leadership development opportunities to executives. I've streamlined the learning functions for several companies by standardizing and improving processes. I understand and can speak the language of business. And I've presented sessions at some of the industry conferences.

***So what should I do to make my transition into retirement go smoothly and assure that I meet the goals I've set for this next phase in my life?***

I've even begun to transfer some of my specialized knowledge to my employer through a succession planning process they have in place. Mentally and emotionally, my wife and I are ready for the change we both want to make.

So what should I do to make my transition into retirement go smoothly and assure that I meet the goals I've set for this next phase in my life? Where should I look for opportunities to use my skills? Is a phased retirement better or worse than going cold turkey? What should I anticipate when I leave the corporate nest?

**Peter Hacar**  
Santa Fe, New Mexico

Dear Peter

How wise you are to begin your planning for retirement before your last day on the job. Most of us don't really retire; instead, we embark on "The Second Act." How will you spend your days?

### **The Second Act**

In planning your next act, consider writing a life plan with these components to guide your decision making process:

- Who do you want to spend your time with? Who do you want to be?
- Do you want to partner with others? Work for another organization? Try defining the communities you want to be involved in, from religious to social.
- What do you envision yourself doing? Writing articles or books? What topics? Speaking at conferences? What about corporate life would you like to keep doing, such as mentoring others? What have you disliked that you would like to do less of? What do you want to learn?

Every community has a need for volunteers; [www.volunteermatch.com](http://www.volunteermatch.com) helps you give back by finding a volunteer position that matches your skills. Check out your local colleges and universities; consider becoming part of the adjunct faculty. Your community, like most, has a small business development center as well as a small business incubator, where your talents, expertise, and business knowledge can be put to good use. This is one path to maintain your engagement and use your tremendous warehouse of skills.

Where do you want to spend your time, energy, and money? This relates strongly to whom you want to spend your time with and how.

When do you want to work? Every day? Full time? Part-time? Half-time? One of the first things I do each year is mark on the calendar when I want to vacation or do something other than work and then I plan the year around those dates. At this stage of life it is important to plan the celebrations. All the other stuff will happen anyway!

Why do you want to get involved with certain activities?

How do you want to spend your days? It is amazing how busy and full our lives can be when we leave the corporate world. Do you have what it takes, though, to manage your time or life without the corporate structure—and amenities—to manage in essence, a home-based entrepreneurial business? Do you need income or insurance?

Essentially, it is all about security. There has been no shortage of press on the fact that our generation has been notoriously poor in the financial planning department. If your finances are not in order, the idea of complete retirement—not working for money—may not be a practical solution.

Once your financial house is in order, it is critical to have the discussion with your spouse, partner, or significant other to ensure that they are looking at the future in the same way you are. If they are expecting extravagant around-the-world trips and you're thinking of downsizing, streamlining, and hiking in the Andes, you want to spend more time discussing what you want out of the Second Act—and what their expectations are as well!



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**Judy Estrin**

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