

retire

ON PURPOSE

**BEYOND FINANCIAL PLANNING:
CREATING THE LIFE YOU WANT**

POST-CAREER INTEREST ASSESSMENT

Developed by Dr. Roger Hall

Not FDIC/NCUA insured • May lose value • Not bank/CU guaranteed
Not a deposit • Not insured by any federal agency

JACKSON[®]
FINANCIAL FREEDOM FOR LIFE[™]

Roger Hall, PhD, in partnership with Jackson®, developed this assessment specifically to connect interests with retirement using one of the most popular and rigorously researched career-interest theories created by noted psychologist John Holland. The purpose of this assessment is to connect you to possible new activities you may enjoy in your retirement. You don't have to be skilled at an activity to mark it as something you might enjoy, and don't base your answers on whether the activity might make money. This is the time in your life to pursue new passions.

Put a **0** in the box next to the item if it doesn't sound like you.
 Put a **1** in the box next to the item if it sounds neutral to you.
 Put a **2** in the box next to the item if it sounds like you.
 After you've filled out all the boxes, you'll total each column at the bottom.

I would describe myself as a person who:						
prefers the simple life ----->	<input type="checkbox"/>					
enjoys solving science problems ----->		<input type="checkbox"/>				
likes to be creative ----->			<input type="checkbox"/>			
enjoys helping others ----->				<input type="checkbox"/>		
likes to solve complex organizational problems ----->					<input type="checkbox"/>	
enjoys organizing things or data ----->						<input type="checkbox"/>
Activities I think I would like (even if I'm not skilled at the task):						
Working with tools ----->	<input type="checkbox"/>					
Reading science articles ----->		<input type="checkbox"/>				
Playing a musical instrument ----->			<input type="checkbox"/>			
Solving a local social problem on a committee ----->				<input type="checkbox"/>		
Watching news and opinion television ----->					<input type="checkbox"/>	
Organizing photos ----->						<input type="checkbox"/>
Gardening ----->	<input type="checkbox"/>					
Visiting museums ----->		<input type="checkbox"/>				
Photography ----->			<input type="checkbox"/>			
Leading a support group ----->				<input type="checkbox"/>		
Watching the stock markets ----->					<input type="checkbox"/>	
Tracking personal finances ----->						<input type="checkbox"/>
TOTALS						
	R	I	A	S	E	C

Volunteer opportunities I would enjoy:						
Planting trees ----->	<input type="checkbox"/>					
Museum guide ----->		<input type="checkbox"/>				
Painting a mural for urban renewal ----->			<input type="checkbox"/>			
Hospital volunteer ----->				<input type="checkbox"/>		
Mentor for Junior Achievement ----->					<input type="checkbox"/>	
Organizing a thrift shop or food pantry ----->						<input type="checkbox"/>
Jobs that sound fun (even if I don't have the training):						
Delivery truck driver ----->	<input type="checkbox"/>					
Geology guide ----->		<input type="checkbox"/>				
Selling homemade crafts ----->			<input type="checkbox"/>			
Red Cross worker ----->				<input type="checkbox"/>		
Event planner ----->					<input type="checkbox"/>	
Library aide ----->						<input type="checkbox"/>
Dog walker ----->	<input type="checkbox"/>					
Freelance science writer ----->		<input type="checkbox"/>				
Movie script writer ----->			<input type="checkbox"/>			
Tour guide ----->				<input type="checkbox"/>		
Business/store owner ----->					<input type="checkbox"/>	
Web developer ----->						<input type="checkbox"/>
I'd like to learn to:						
Weld ----->	<input type="checkbox"/>					
Use a telescope to study stars ----->		<input type="checkbox"/>				
Play a musical instrument ----->			<input type="checkbox"/>			
Counsel others ----->				<input type="checkbox"/>		
Create social media marketing ----->					<input type="checkbox"/>	
Inventory a store ----->						<input type="checkbox"/>
TOTALS						
	R	I	A	S	E	C
GRAND TOTALS (add totals from page 2 and 3)						
	R	I	A	S	E	C

Now circle the letters with the highest three numbers in the grand totals. You'll learn more about these categories on the next few pages. The results may give you some ideas on how to connect your interests to possible jobs, volunteering, or activities for this next phase of your life.

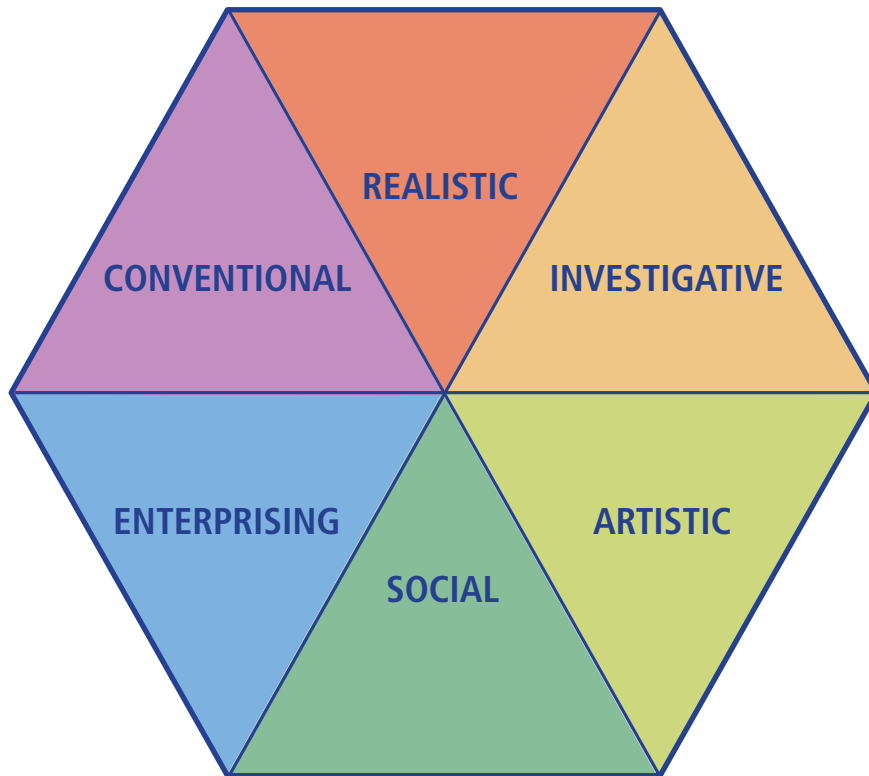
ADD MEANING AND FUN TO YOUR FUTURE YEARS.

A happy life is one with meaning, accomplishment, and engagement. How can you integrate your interests, hobbies, and passions into a purposeful (and fun) retirement?

The basis of this assessment uses a career-interest theory created by American psychologist and former Johns Hopkins University professor John Holland (1919–2008). He published his first paper on occupational theory in 1958, and now his work is the basis of dozens of career-interest surveys and is currently being used by the U.S. Department of Labor on their online database.

The Holland system divides people and jobs into six basic types, arranged in a hexagon with each of the types on a point of the hexagon. The types that are adjacent on the hexagon are more similar to each other than the types on the opposite sides of the hexagon.

While you may fall heavily into one category, your interests, skills, and passions may fall into other categories as well.



Write down your dominant category: _____

Then list the other two highest categories: _____ and _____

Over the next few pages, we illustrate how you can pair your natural abilities with your interests to find the jobs, volunteer opportunities, and activities that can give your life purpose. This can be a great tool to share with your family, friends, fellow church members, and social circles to see how you might have shared goals or interests.

REALISTIC

You are the person who likes to solve problems with tangible things and gravitates toward careers such as agriculture, engineering, trades (plumbing, electrical work, etc.), skilled machinery, forestry, athletics, the military, or law enforcement. You might like to see the tangible result of your work and tend to live a simple life. You have interests in the outdoors and physical activity. Below are activities, jobs, and volunteer opportunities that may interest you.

SAMPLE JOBS

- Fishing guide
- Driver
 - Delivery
 - Uber/Lyft
 - School bus
- Carpenter
- Sound technician
- Handyman
- Dog walker
- Chef—sous/personal
- Corporate security guard
- Retail or specialty store associate
 - Kitchen
 - Tackle/fly
 - Auto parts
 - Athletic store

VOLUNTEER OPPORTUNITIES

- Habitat for Humanity volunteer
- Clean a waterway
- Teach a car maintenance class
- Repair cars for low-income families
- Train or foster a service dog
- Build a community garden
- Build sets for a local theater company
- Hunting or fishing guide
- National Parks Service volunteer
- Teach at the AARP Driver Safety Program
- Volunteer for Meals on Wheels or a local community food bank
- Coach a local youth sports team

ACTIVITIES

- Ride motorcycles or join a motorcycle club
- Run or walk
- Plant a garden
- Fishing
- Welding
- Explore local trails
- Ride horses
- Woodwork
 - Build furniture
 - Build a treehouse
- Take your family hiking, swimming or ziplining
- Join an athletic team
- Join a local trade association
- Attend SilverSneakers, yoga, meditation, or water aerobics classes

INVESTIGATIVE

You are the person who likes idea problems. You tend to gravitate toward the sciences in professional life or in your interests and hobbies. You also gravitate to some parts of the medical world—mostly in the science of medicine, rather than the patient care of medicine. You like the freedom to explore an idea as it suits you. You like to solve abstract problems. You have interests in reading and intellectual activities. You may enjoy solving mental puzzles. Below are activities, jobs, or volunteer opportunities you might enjoy.

SAMPLE JOBS

- Museum guide
- Geology guide
- Science consultant
- Weather station operator
- ACT/SAT test prep teacher
- Tutor
- Science writer
- University archivist
- Genealogy researcher
- Substitute teacher
- Lab assistant
- Local politician
- Retail or specialty store associate
 - Medical supply store
 - Pharmacy tech
 - Book store

VOLUNTEER OPPORTUNITIES

- Tutor math at an after-school program
- Planetarium guide
- Reference library aid
- Local museum docent
- Write/edit articles for favorite science pub
- Science tutor
- Contribute to Wikipedia articles

ACTIVITIES

- Visit museums
- Collect butterflies
- Research family genealogy
- Take your family to your local natural history museum
- Teach a science class for a home-school co-op
- Create science experiments
- Take classes at a local university or community college
- Join a local research, scientific, or teaching association
- Get a master's degree or doctorate
- Read science journals

ARTISTIC

You are the person who likes expressing ideas. You like to be creative and different from the rest of the population. You cherish being unique. You tend to gravitate toward the arts—theatre, painting, drawing, sculpture, music, photography, crafts—including fine woodworking, and culinary arts. You like surrounding yourself with other creatives and being the first to try a new idea or activity. You may be like many older adults who decided to be “practical” in their careers and find that as you have gotten older you are more attracted to artistic pursuits. Below are activities, jobs, or volunteer opportunities you might enjoy.

SAMPLE JOBS

- Music writer or publisher
- Photographer/editor
- Independent radio DJ
- Book reviewer
- Commissioned artist
- Art instructor
- Video editor
- Multimedia artist
- Graphic designer
- Mural painter
- Web developer
- Design consultant
- Retail or specialty store associate
 - Craft store
 - Art supply
 - Music supply
 - Art gallery

VOLUNTEER OPPORTUNITIES

- Graphic design for nonprofit
- Teach dance to children
- Sing in community choir
- Take pictures for local humane society or rescues
- Prepare meals for charity food delivery services
- Writing coach
- Teach music lessons
- Build/paint bird houses for Audubon Society
- Write a blog
- Host/hostess for nonprofit art gallery
- Direct or paint/build scenes for local children’s theatre
- Teach an art class

ACTIVITIES

- Write a novel, short story, or poems
- Publish stories of your life to give to your family
- Scrapbook
- Take an art class
- Go to concerts
- Learn to play a musical instrument
- Create craft activities
- Contribute your photos to online photo libraries
- Play in a band or musical group
- Write music or movie scripts
- Take a photography course
- Learn to paint or study watercolor/oils
- Attend symphony, plays, or gallery openings

SOCIAL

You are the person who likes working with other people—to help others. You are the social workers, schoolteachers, and the people in the practical parts of medical care, the counselors, and any of the other helping professions. You like to work on committees to solve community problems. You tend to be the visible volunteers in community activities. You like to solve problems through discussion and collaboration. In retirement, you sometimes take an active role in the lives of your grandchildren's childcare or educational supplementation. Below are activities, jobs, or volunteer opportunities you might enjoy.

SAMPLE JOBS

- Hospital volunteer
- Crisis counselor
- Self-help author
- Nanny/babysitter
- Concierge
- Mediator
- Legal aid advisor
- First aid or CPR instructor
- Community college teacher
- Red Cross worker
- Surgical waiting room guide
- Interpreter/translator
- Tutor
- Tour guide
- Substitute teacher
- Answer phones for a small office
- Retail, boutique, or specialty shop associate

VOLUNTEER OPPORTUNITIES

- Staff the "Mom's Day Out" picnic
- Organize a dance for the local VFW or dance club
- Lead a book discussion club
- Organize a picnic for underprivileged kids
- Teach a class
- Volunteer as a greeter at a local fundraiser
- Serve meals at the homeless shelter
- Tutor kids who are learning to read
- Staff the information desk at a hospital
- Visit the elderly
- Give walking tours of historical downtown
- Fundraiser for a favorite charity
- Event planning for a favorite charity
- Mentor at Big Brothers Big Sisters
- Volunteer at a local YMCA
- Cub Scout/Girl Scout leader

ACTIVITIES

- Join a travel group to see the world
- Take a cruise
- Learn a second language
- Organize a weekly game, book, coffee or supper club
- Join a local club or association
- Attend group exercise classes
- Learn/take classes in:
 - Counseling
 - Social work
 - Nonprofit management
 - Court-appointed special advocate for children

ENTERPRISING

You are the person who likes to work with other people—very often to persuade them to see things your way. You tend to gravitate toward businesses that involve selling or marketing. You are interested in how money works and how to make money work for you. You might be interested in politics at a local, national, or international level. You sometimes like to speak in front of groups and often like to be the decision maker in an organization. In retirement, your interests may have turned from business to charitable work—and you have perhaps been disappointed with the outcomes you see in charitable work. In retirement, you might like activities, jobs, or volunteer opportunities such as:

SAMPLE JOBS

- Management analyst
- eBay seller
- Consultant
- Ombudsperson for local college
- Chamber of commerce liaison
- Executive recruiter
- Event planner
- Leadership development blogger or author
- Business owner or co-owner
- Industry consultant
- Personal shopper
- Mystery shopper

VOLUNTEER OPPORTUNITIES

- SCORE (Service Corps of Retired Executives) volunteer
- Mentor to Junior Achievement
- Write a political blog
- Organize political rallies
- Teach finance classes at your local university
- Volunteer at a legal aid clinic
- Become a board member or provide marketing consulting or accounting for a nonprofit
- Mentor with a local entrepreneur center (through the chamber of commerce or university)
- Start or partner to start your own nonprofit
- Volunteer for your local SBA
- Canvas for a local politician
- Do research for a local political campaign

ACTIVITIES

- Track investments and teach others how to invest
- Join Toastmasters
- Help a family member start a small business
- Mentor a young entrepreneur
- Create a TED talk
- Guest lecture at a local high school, college, or university
- Start or join an association or trade group
- Join a chamber of commerce
- Take a class in:
 - Political science
 - Online marketing
 - Business
 - Financing

CONVENTIONAL

You are the person who likes to solve problems to organize data or things. You tend to gravitate toward jobs where attention to detail and organization are valued. You like being in the background making sure the logistics are completed without much fanfare. You tend to be in jobs such as banking, accounting, bookkeeping, programming, and other detail-oriented jobs. In retirement, you may want to expand to other areas of interest that you haven't been able to express in your career life, and you may want to apply those same skills to volunteer opportunities. Below are activities, jobs, or volunteer opportunities you might enjoy.

SAMPLE JOBS

- Tax preparer
- Virtual assistant
- Inventory worker
- Bookkeeper
- Personal organizer
- Tax preparer
- Cashier
- Data analyst
- Search engine optimization expert
- Software developer
- Web developer
- Code writer
- Editor or proofreader
- Industry expert consultant
- Librarian or library assistant
- Medical transcriptionist
- Webmaster

VOLUNTEER OPPORTUNITIES

- Manage your organization's membership management software
- Prepare taxes for those who can't afford an accountant
- Prepare a bulletin for a local organization
- Transcribe sermons or lectures for deaf people
- Manage logistics for the local food bank
- Become your city/town historian
- Organize the local thrift shop or food pantry
- Become a library aide for a neighborhood middle school or high school
- Help with event planning for a charitable organization
- Be a logistics liaison for a small, local political campaign
- Join a local nonprofit board

ACTIVITIES

- Help your friends or family organize their closets, garage, or home
- Organize family photos online or in albums
- Paint miniatures
- Teach someone to sew, knit, or cross stitch
- Create a personalized website for family
- Get a degree: BA, MA, or PhD
- Join an industry association, trade group, or book club
- Learn to:
 - Knit
 - Crochet
 - Needlepoint
- Take a course in:
 - App or software development
 - Programming
 - Bookkeeping
 - SEO
 - AutoCAD

ADDITIONAL RESOURCES

JOBS

Visit popular job-posting websites as these sites may also include part-time employment, contract work, and virtual career opportunities.

- LinkedIn
- Indeed.com
- RetirementJobs.com
- Local area Chamber of Commerce—the career tab

Hire a headhunter with expertise in encore careers. Many are free of charge to the job seeker.

Research local centers for nonprofit management. These organizations often have job postings not listed on the major job boards.

VOLUNTEER

Visit www.taprootfoundation.org. Taproot Foundation helps nonprofits and social change organizations solve critical challenges in their communities by connecting them with the support of skilled volunteers sharing their expertise pro bono.

Call to schedule an appointment with your area entrepreneur center. Larger cities may have an independent center, while smaller cities and towns partner with a local college or university. These centers are always in need of mentors or volunteers.

Research local nonprofit management centers. These organizations often have an easy way to search for volunteer or pro bono work in your local area.

Research your favorite charity or nonprofit to see if there is a local chapter near you.

Explore www.mentor.org for volunteer opportunities.

ACTIVITIES

Take a course in your area of interest at your local community college.

Sign up for classes at your local YMCA, YWCA, or area fitness club. Many larger fitness clubs have groups and classes designed specifically for patrons over the age of 50.

Research local nonprofit management centers. These organizations often have classes to train professionals for careers, board roles, or volunteer work specific to the nonprofit world.



Consulting psychologist Roger Hall, PhD, works with leaders in small, entrepreneurial firms and Fortune 20 companies in a wide variety of industries from law, healthcare, insurance, publishing, and retail to missionary agencies, churches, universities, and public and private schools.

He trains leaders to think more clearly, act more decisively and interact more effectively. Better outcomes are a result of better actions. He coaches young leaders, executives, and groups to discipline their thinking to lead to greater performance.

Dr. Hall received his doctorate in psychology from Ohio State University in 1991. His recently published workbook, *Expedition*, is now available on his website, www.compassconsultation.com.

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FINANCIAL FREEDOM FOR LIFE™