

Personal Vision Statement Worksheet

This worksheet is designed to help you create a Personal Vision Statement for your elderhood (retirement) lifestyle. Vision statements are often confused with mission statements. Vision statements and mission statements are complimentary, yet very different.

Here's the main difference between the two. Your Personal Vision Statement should be *future oriented* whereas your Personal Mission Statement needs to reflect your activities *in the present tense* or what you are or will soon be engaged in. On the other hand, your Personal Vision Statement should indicate who or what will likely benefit from the activities described in your Personal Mission Statement. In short, your Personal Vision Statement should describe a scenario or a world as you ideally envision it or would like it to be.

There are several ways to go about crafting your Personal Vision Statement. This is only one approach. The process generally requires some deep thought and self-reflection. Set aside some quality time for this exercise. Let's get started.

Building your retirement vision

You have several options for creating your Personal Vision Statement that is both meaningful and relevant to you. One often-made suggestion is to consider what you would say if you were to write your own eulogy, which is not an approach I recommend. Another suggestion is to create a business card that conveys what you are doing or engaged in during elderhood (retirement) just as a regular business card conveys what a person does for work.

However, my suggested approach is for you to reflect on a few thought-provoking questions like the three listed below to help you arrive at a retirement vision for yourself. Keep in mind that your Personal Vision Statement should be reflective of your Personal Mission Statement since the two are complimentary.

What would you wish for if you had a magic wand?

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What would you want your community, city, state or the world to look like in the future based on your values or based on what is important to you?

What problem, situation or issue do you want to see eliminated?

Elements of a good Personal Vision Statement:

- It is simple and concise.
- It is easy to understand.
- It needs to be relevant to you.
- It is consistent with your core values.
- Do not use jargon or buzzwords.
- Try to limit your statement to one sentence.

That's about it. It may be helpful to refer to the Core Values worksheet included in your Retirement Toolkit. The rest requires some introspection and self-reflection on your part and editing your draft Vision Statement until you are happy with it, it is consistent with your core values, and you are strongly committed to it.

Best of luck creating your Personal Vision Statement!