

# HOW READY ARE YOU?

TRANSITION PREPAREDNESS SELF-ASSESSMENT

Determine your preparedness to transition into the next stage of your life



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The purpose of this transition preparedness questionnaire is to provide you with objective, qualitative data to determine how prepared you are to transition to the next stage of your life: your emotional, intellectual, psychological, and spiritual needs, as well as how you will plan your future lifestyle, all of which can help you live a life filled with significance. The assessment consists of preparedness questions and analysis sections, as well as next steps to help you move forward.

## EMOTIONAL PREPAREDNESS

<p><b>EMOTIONAL PREPAREDNESS QUESTIONS</b></p>	<p>1. Do I feel that my future will be better than my past? Yes__ No __</p> <p>2. Do I have an optimistic view of the world? Yes__ No __</p> <p>3. Do I know what gives my life purpose? Yes__ No __</p> <p>4. Do I know who I really am? Yes__ No __</p> <p>5. Do I love myself? Yes__ No __</p> <p>6. Do I have strong personal relationships? Yes__ No __</p> <p>7. Do I constantly criticize myself? Yes__ No __</p>
<p><b>ANALYSIS</b></p>	<p><b>Step 1. Total the number of No's ____</b></p> <p><b>Step 2. Determine your score on the scale below and check the appropriate box:</b></p> <p>6 to 7 No's Not emotionally prepared <input type="checkbox"/></p> <p>3 to 5 No's More emotional work needs to be done <input type="checkbox"/></p> <p>1 to 2 No's Emotionally prepared <input type="checkbox"/></p>

# PSYCHOLOGICAL PREPAREDNESS

<p><b>PSYCHOLOGICAL PREPAREDNESS QUESTIONS</b></p>	<ol style="list-style-type: none"> <li>1. Do I feel confident of making a successful transition? Yes__ No __</li> <li>2. Am I willing to let go of my beliefs to determine my future? Yes__ No __</li> <li>3. Do I feel that my life is on solid ground? Yes__ No __</li> <li>4. Do I realize how important my life is? Yes__ No __</li> <li>5. Do I know how I will introduce myself after I have left my position? Yes__ No __</li> <li>6. Is self-care a high priority to me? Yes__ No __</li> <li>7. Do I give myself permission to make mistakes? Yes__ No __</li> </ol>
<p><b>ANALYSIS</b></p>	<p><b>Step 1. Total the number of No's ____</b></p> <p><b>Step 2. Determine your score on the scale below and check the appropriate box:</b></p> <p>6 to 7 No's Not psychologically prepared <input type="checkbox"/></p> <p>3 to 5 No's More psychological preparation needs to be done <input type="checkbox"/></p> <p>1 to 2 No's Psychologically prepared <input type="checkbox"/></p>

# SPIRITUAL PREPAREDNESS

<p><b>SPIRITUAL PREPAREDNESS QUESTIONS</b></p>	<ol style="list-style-type: none"> <li>1. Do I feel that my life is meaningful? Yes___ No ___</li> <li>2. Do I feel fortunate? Yes___ No ___</li> <li>3. Do I know who I really am outside of my work? Yes___ No ___</li> <li>4. Do I feel that I am accomplishing my life's mission? Yes___ No ___</li> <li>5. Do I believe that I am living up to my fullest potential? Yes___ No ___</li> <li>6. Do I feel that my life is complete? Yes___ No ___</li> <li>7. Do I find the positives in negative situations? Yes___ No ___</li> </ol>
<p><b>ANALYSIS</b></p>	<p><b>Step 1. Total the number of No's ___</b></p> <p><b>Step 2. Determine your score on the scale below and check the appropriate box:</b></p> <p>6 to 7 No's Not spirituality prepared <input type="checkbox"/></p> <p>3 to 5 No's More spiritual preparation needs to be done <input type="checkbox"/></p> <p>1 to 2 No's Spirituality prepared <input type="checkbox"/></p>

## INTELLECTUAL PREPAREDNESS

### INTELLECTUAL PREPAREDNESS QUESTIONS

1. Do I avoid looking for what could go wrong? Yes\_\_ No\_\_
2. Do I feel that I always need to think positively? Yes\_\_ No\_\_
3. Do I deny facts that challenge my beliefs? Yes\_\_ No\_\_
4. Do I have a tendency to repress “negative” feelings? Yes\_\_ No\_\_
5. Do I avoid looking at the downsides of a situation? Yes\_\_ No\_\_
6. Do I sidestep creating a range of options? Yes\_\_ No\_\_
7. Do I hold onto decisions even though they are not working?  
Yes\_\_ No\_\_
8. Do I have a tendency to make quick decisions? Yes\_\_ No\_\_
9. Do I categorize my experiences? Yes\_\_ No\_\_
10. Do I tend to compartmentalize my life? Yes\_\_ No\_\_
11. Do I feel uncomfortable with a lot of choices? Yes\_\_ No\_\_
12. Do I often think of doing only one thing? Yes\_\_ No\_\_
13. Do I avoid looking for interactions among choices? Yes\_\_ No\_\_
14. Do I take a narrow approach to how I view things? Yes\_\_ No\_\_
15. Do I usually have a short-term perspective? Yes\_\_ No\_\_
16. Do I ignore or factor out my values when making decisions? Yes\_\_  
No\_\_
17. Do I avoid listening to my intuition? Yes\_\_ No\_\_
18. Do I skirt asking how will this decision make me feel? Yes\_\_ No\_\_
19. Do I view “meaning” as irrelevant when making choices?  
Yes\_\_ No\_\_
20. Do I shun looking at the ramifications of my choices? Yes\_\_ No\_\_
21. Do I ignore the various aspects of potential options? Yes\_\_ No\_\_
22. Do I have a strong need to stay within my comfort zone? Yes\_\_ No\_\_
23. Do I feel uncomfortable with change? Yes\_\_ No\_\_
24. Do I feel that the “devil is in the details?” Yes\_\_ No\_\_
25. Do I bypass making tactical plans for my decisions? Yes\_\_ No\_\_
26. Do I avoid setting objectives for the choices that I make? Yes\_\_ No\_\_
27. Do I think that things will take care of themselves? Yes\_\_ No\_\_

	<p>28. Do I avoid thinking about how I am going to execute? Yes__ No__ 30.</p> <p>29. Do I believe that I am never good enough? Yes__ No__</p> <p>30. Do I procrastinate to avoid doing something wrong? Yes____ No____</p> <p>31. Do I come down hard on myself when I make a mistake? Yes____ No____</p> <p>32. Do I expect too much of myself? Yes____ No____</p> <p>33. Do I assume that if I can't do it perfectly, I won't try? Yes____ No____</p> <p>34. Do I set very, very high standards for myself? Yes____ No____</p> <p>35. Do I measure myself and what I do, in 100% or 0% terms? Yes__ No__</p>
<p><b>ANALYSIS</b></p>	<p><b>Step 1. Total the number of Yes's ____</b></p> <p><b>Step 2. Determine your score on the scale below and check the appropriate box:</b></p> <p>25 to 36    Yes's    Not intellectually prepared    <input type="checkbox"/></p> <p>11 to 24    Yes's    More intellectual preparation needs to be done    <input type="checkbox"/></p> <p>1 to 10    Yes's    Intellectually prepared    <input type="checkbox"/></p>

# LIFESTYLE PREPAREDNESS

<p><b>LIFESTYLE PREPAREDNESS QUESTIONS</b></p>	<p>1. Do I have a “non-financial retirement plan?” Yes__ No __</p> <p>2. Do I know what I want to do in all aspects of my life? Yes__ No __</p> <p>3. Do I know what I am afraid about in my future Yes__ No __</p> <p>4. Do I have a plan for how I want to live the next stage of my life? Yes__ No __</p> <p>5. Do I have a “common sheet of music” with my spouse? Yes__ No __</p> <p>6. Do I know the purpose of my life? Yes__ No __</p> <p>7. Do I have a passion for what I am going to be doing? Yes__ No __</p>
<p><b>ANALYSIS</b></p>	<p><b>Step 1. Total the number of No’s ____</b></p> <p><b>Step 2. Determine your score on the scale below and check the appropriate box:</b></p> <p>6 to 7 No’s Not structurally prepared <input type="checkbox"/></p> <p>3 to 5 No’s More structural preparation needs to be done <input type="checkbox"/></p> <p>1 to 2 No’s Structurally prepared <input type="checkbox"/></p>



## PERSONAL ASSESSMENT SUMMARY

**STEP 1:** Review each analysis section and check the appropriate boxes below:

ASPECT OF YOUR LIFE	PREPARED	NEEDS WORK	NOT PREPARED
EMOTIONAL			
PSYCHOLOGICAL			
SPIRITUAL			
INTELLECTUAL			
LIFESTYLE			

**STEP 2:** To address the aspects of your life that you have checked as “NEEDS WORK” and/or “NOT PREPARED”, we encourage you to consider our self-directed programs:

- [\*Exploring Your Life, Shaping Your Future™\*](#)

OR

- [\*What's Next? Self-Assessment™\*](#) (For Business Owners)

**STEP 3:** If you want additional guidance and accountability, we encourage you to consider working with a *Transition Planning Consultant* in one of the following programs:

- *What's Next? Workshop for Baby Boomers™*

OR

- One of our private coaching programs:
  - *EXPLORE Coaching™ Program*
  - *WHAT's NEXT Coaching™ Program* (For Business Owners)
  - *"LIVE" – Living a Dynamic and Purposeful Life: 7 Steps for Creating Your Successful Transition™*
  - *"THINK" – Strategic Thinking about Your Business and Personal Future™* (For Business Owners)
  - *"DECIDE" – Creating and Implementing a Successful Business Transition Strategy™* (For Business Owners)

These enlightening new programs will help you prepare for a dynamic, fulfilling life, while providing a practical step-by-step approach to help shift your personal motivation from being *goal-driven* to *purpose-driven*.

**FOR MORE INFORMATION, PLEASE CONTACT:**

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