

Holistic Retirement Planning

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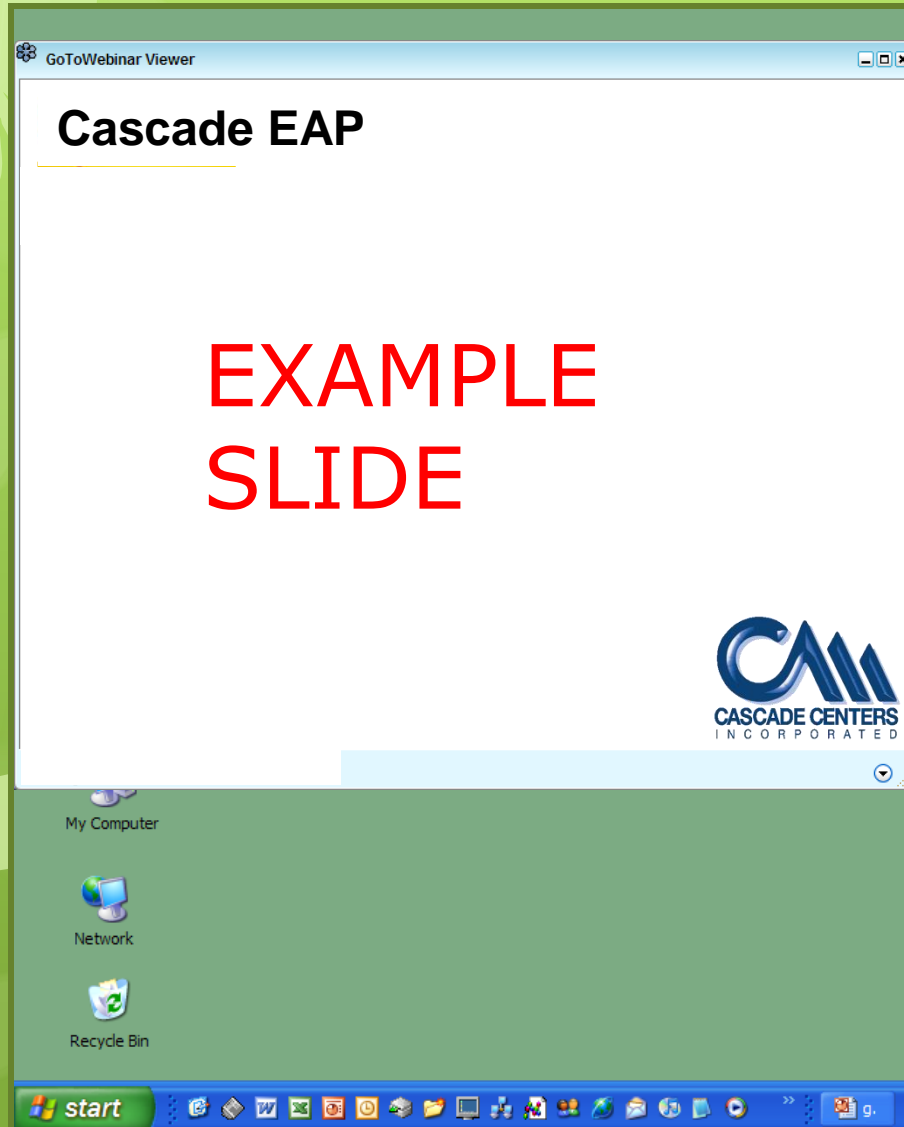
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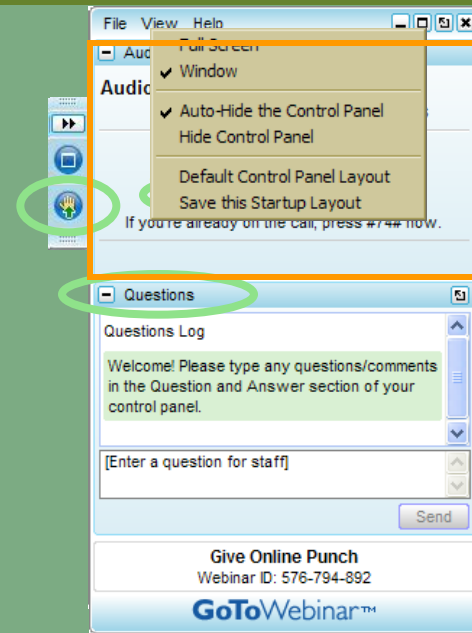
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GoToWebinar Attendee Interface

1. Viewer Window



2. Control Panel



PUTTING THE PIECES TOGETHER



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POLL QUESTION #1

**WHICH IS THE MOST IMPORTANT
INGREDIENT FOR ACHIEVING A
HAPPY RETIREMENT?**

- A. A SOUND FINANCIAL PLAN**
- B. GOOD HEALTH**
- C. A BRIGHT RED CONVERTIBLE**



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GOOD HEALTH

**WITHOUT YOUR HEALTH, YOU
DON'T HAVE MUCH.**

**AND...THERE IS A FINANCIAL
INCENTIVE TO STAY HEALTHY!**



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TOP TEN TIPS

- 1. STOP SMOKING**
- 2. KNOW YOUR CHOLESTEROL NUMBERS**
- 3. KNOW YOUR BLOOD SUGER NUMBERS**
- 4. MAINTAIN A HEALTHY WEIGHT**
- 5. ANOTHER NUMBER TO KNOW: BMI**



TOP TEN TIPS

6. EASE INTO EXERCISE

7. FIND A WAY TO RELAX

8. EXPRESS YOURSELF

9. BE MINDFUL OF HOW YOU THINK

10. BE AWARE OF YOUR BLOOD PRESSURE



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POLL QUESTION #2

**OF ALL THE SUGGESTIONS I JUST
DISCUSSED FOR FINDING A WAY TO
RELAX, WHICH IS THE MOST
EFFECTIVE?**

A. MUSCLE RELAXATION

B. DEEP BREATHING

C. MEDITATION

Full Catastrophe Living by Jon Kabat-Zinn



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ACKNOWLEDGE LOSS

- Shock or Denial
- Sadness
- Anger or Frustration
- Bargaining, Wondering if perhaps part-time is a better option
- Acceptance



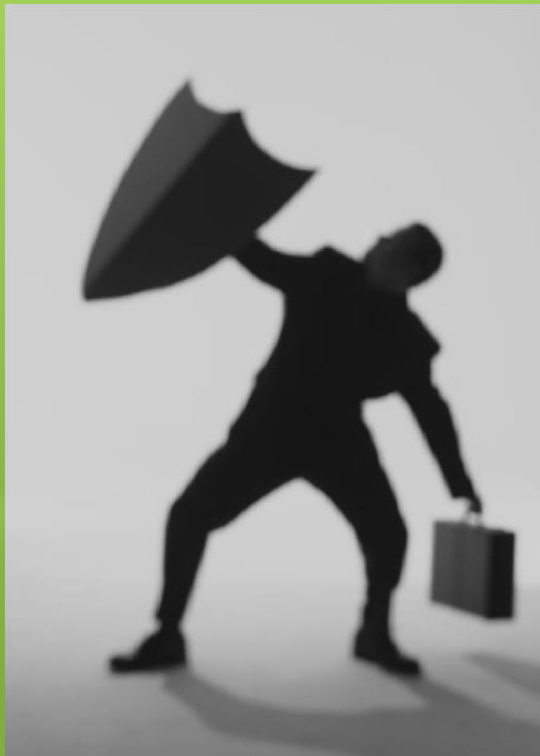
TAKE THIS JOB AND SHOVE IT!!!



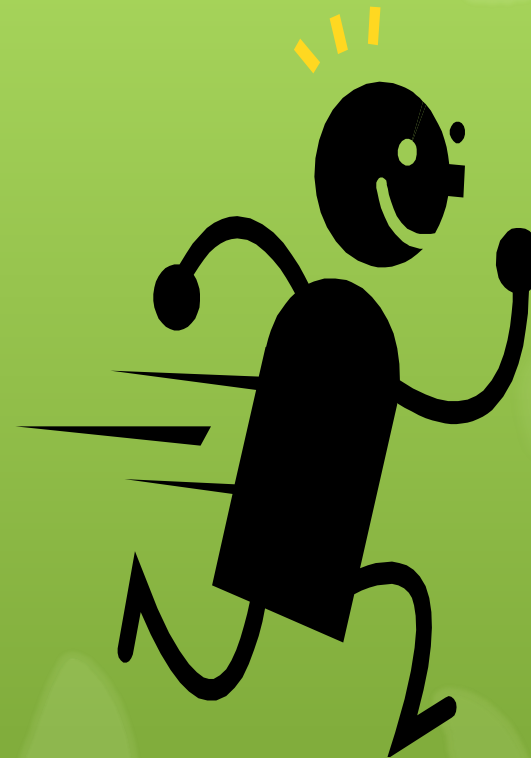
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HOW ARE YOU TRAVELING?

- BACKING AWAY FROM A BAD SITUATION WITH BITTER TASTE?



- RUNNING TOWARD YOUR BLISS WITH GLEE?



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BABY BOOMERS: LEADING THE WAY

- Pioneers in a new life stage**
- Seeking out new possibilities**
- Involves looking ahead and asking: WHAT'S NEXT?**

**Life Reimagined: Discovering Your
New Life Possibilities**

By Richard Leider & Alan Webber



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Guidepost #1

REFLECT: What's real for you?

Think of reflection *as a break.*

It involves *revisiting the narrative* in your head about your life up until now....and from here on.

Say NO to life “clutter” and YES to *things that give you purpose!*



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Guidepost #2

CONNECT: Convene a feedback panel.

- 1. The cornerstone of connecting is building a sounding board.**
- 2. Find one committed listener.**
- 3. Slowly add new members.**
- 4. Don't forget that connection is a two-way street**



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Guidepost #3

EXPLORE: Be open to the unknown.

- *Browse a different magazine.**
- *Learn a new language.**
- *Take a voice or music lesson.**
- *Go home a different route.**
- *Venture into a tavern with line dancing.**

**Design any other activity to get
outside of your comfort zone!**



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Guidepost #4

CHOOSE: Whittle down your options.

○ Take time out.

**○ Volunteer. (Earthwatch.org,
Encore.org, PivotPlanet.com)**

○ Say hello.

○ Keep track.



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Guidepost #5

REPACK: What's essential for the road ahead?

Try this writing exercise!

Write your memoir. Start with the past in a summary.

Now move to the present.



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Guidepost #6

ACT: Make your possibilities real by taking action.

- Take a first step in a new direction.**
- Weigh in with your sounding board.**
- Take one chance per day.**



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POLL QUESTION #3

What percentage of Americans believe in God or some form of a Higher Power?

- A. 38%**
- B. 51%**
- C. 75%**
- D. 93%**



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SOME GREAT BOOKS

- **Care of the Soul**: A guide for cultivating depth and sacredness in everyday life. By Thomas Moore.
- **Healthy Aging**: A lifelong guide to your physical & spiritual well-being. By Andrew Weil
- **Ageless Body, Timeless Mind**: The quantum alternative to growing old. By Deepak Chopra
- **A Path With Heart**: A guide through the perils & promises of spiritual life. By Jack Kornfield
- **A New Earth**: Awakening to your life's purpose. By Eckhart Tolle
- **Peace Is Every Step**: The path of mindfulness in everyday life. By Thich Nhat Hanh
- **The Art of Happiness**: A handbook for living. By The Dalai Lama



**Do you have
any questions?**



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