

Role Replacement Map

Purpose: This worksheet helps you intentionally replace the *psychological benefits* of work roles (not the job itself) with meaningful activities in retirement. The goal is fulfillment, not business.

Step 1: Identify a Meaningful Work Role

Think of a role from your work life that gave you energy or satisfaction.

Examples: Leader, Problem-Solver, Mentor, Organizer, Helper, Expert, Builder

Work Role / Identity: _____

Step 2: What This Role Gave You (The Hidden Benefits)

Check or circle the benefits this role provided.

- Feeling useful or needed
- Sense of purpose or contribution
- Daily structure or routine
- Social connection or belonging
- Challenge or growth
- Recognition or appreciation
- Using skills or experience

Other benefits: _____

Step 3: Your Core Drivers (Choose 1–2)

Which motivations mattered most to you in this role?

- Helping / Serving
- Teaching / Mentoring
- Learning / Growing
- Creating / Building
- Leading / Organizing
- Supporting / Encouraging
- Problem-Solving

Role Replacement Map

Step 4: Retirement Role Replacements

List new or existing activities that could meet the *same needs* without recreating a job. Examples: mentoring, volunteering, learning groups, community roles, creative projects, caregiving, part-time involvement

Psychological Need	Possible Retirement Activities
Contribution	
Competence	
Connection	

Step 5: Design Light Structure

Choose one anchor activity to start with. **Weekly Anchor Activity:** _____

How often? Daily Weekly Monthly

Step 6: Gentle Reflection

Answer briefly—no overthinking.

- *Does this activity energize me?* Yes Somewhat No
- *Does it allow choice and flexibility?* Yes Somewhat No
- *Does it help me feel useful or connected?* Yes Somewhat No

If not, adjust. Retirement is a design process, not a one-time decision.

Key Reminder

You are not replacing your job — you are replacing the *meaning* it provided.

Small, intentional roles often create the greatest fulfillment.