

Psychological and Emotional Aspects of Retirement: Planning for a Successful Transition

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Overview

- ◆ Retirement research
- ◆ Psychological and emotional impact
- ◆ Strategies for successful transition

Introduction:

Compelling and challenging, the retirement process involves transitioning to a new identity. This process can become self-empowering and lead to creative ways to self-reinvent and thrive.

The following will help you plan for a fulfilling retirement.

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“New definition of Retirement: Stay Engaged”

Recent research shows that many “high achievers” don’t want to fully retire: They take a break, to choose what new paths of work/life balance quests will be fulfilling to them. They re-invent themselves!

(Approximately 30% of the sample were considered high achievers. About 1/2 of the sample want 50% partial retirement; and only 6% want to fully retire.)

Pre-retirement

- ◆ While working, retirement can seem like both an upcoming burden, and a distant paradise
- ◆ While logistical plans about retirement are being made, psychological and emotional aspects of retirement should not be overlooked or minimized
- ◆ Working through these aspects is one hallmark of a successful transition process.

Psychological issues surfacing during the transition process include:

- ◆ Purpose
- ◆ Self-identity
- ◆ Fulfillment

Emotions experienced include:

- ◆ Excitement
 - ◆ Joy
 - ◆ Freedom
 - ◆ Accomplishment
 - ◆ Peace of mind
 - ◆ Optimism
 - ◆ Ambivalence
 - ◆ Sadness (re: loss /change in professional identity, collegial community)
 - ◆ Anxiety (angst)
 - ◆ Pessimism
 - ◆ Ambivalence
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Understanding Emotions that Accompany the Retirement Process

- ◆ Experiencing a full range of emotions is normal during any period of change
 - ◆ Emotions aren't experienced in a linear fashion; they often overlap
 - ◆ Appreciating and integrating emotions inherent in this transition relieves /mitigates stress
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“5 Keys to Happiness” that Contribute to Psychological and Emotional Well-Being

- ◆ Having satisfying relationships
- ◆ Mind / body fitness
- ◆ Being financially secure as possible
 (“balance between the dao and the dow”)
- ◆ Staying “young at heart”
- ◆ Acts of kindness

Purpose, Self-identity, and Fulfillment

- ◆ Develop a plan to reinvent yourself
- ◆ Ask yourself:
 - “Who am I?”
 - “What do I want to do now?”
 - “What is meaningful to me?”
- ◆ Create a new vision of who you want to be, embrace the new, unproven

Strategies for a Successful Transition

- ◆ Visualize who you want to become
 - ◆ Gradually implement lifestyle changes
 - ◆ Share your new plans and goals with family, colleagues, and friends
 - ◆ Use your emotional intelligence: by recognizing it takes conscious effort, time, and perseverance to evolve
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Actions to Take for a Successful Transition

- ◆ Pursue meaningful work (i.e., “Encore Career”), and leisure activities/hobbies
- ◆ Create new relationships & social ties/network (to people of all ages, cultures, interests-global)
- ◆ Learn new skills & professional endeavors
- ◆ Become active in projects you couldn't pursue while working
- ◆ Consider fulfilling volunteer work if desirable

Summary

A successful transition to post-retirement (including partial-retirement, embraces the inherent psychological and emotional aspects of this process, thus contributing to overall well-being in the years to come.

For confidential counseling
regarding retirement, contact
the UCSF Faculty and Staff
Assistance Program (FSAP).

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References

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