



A TALE OF TWO RETIREES

Retirement By Design or Retirement By Chance

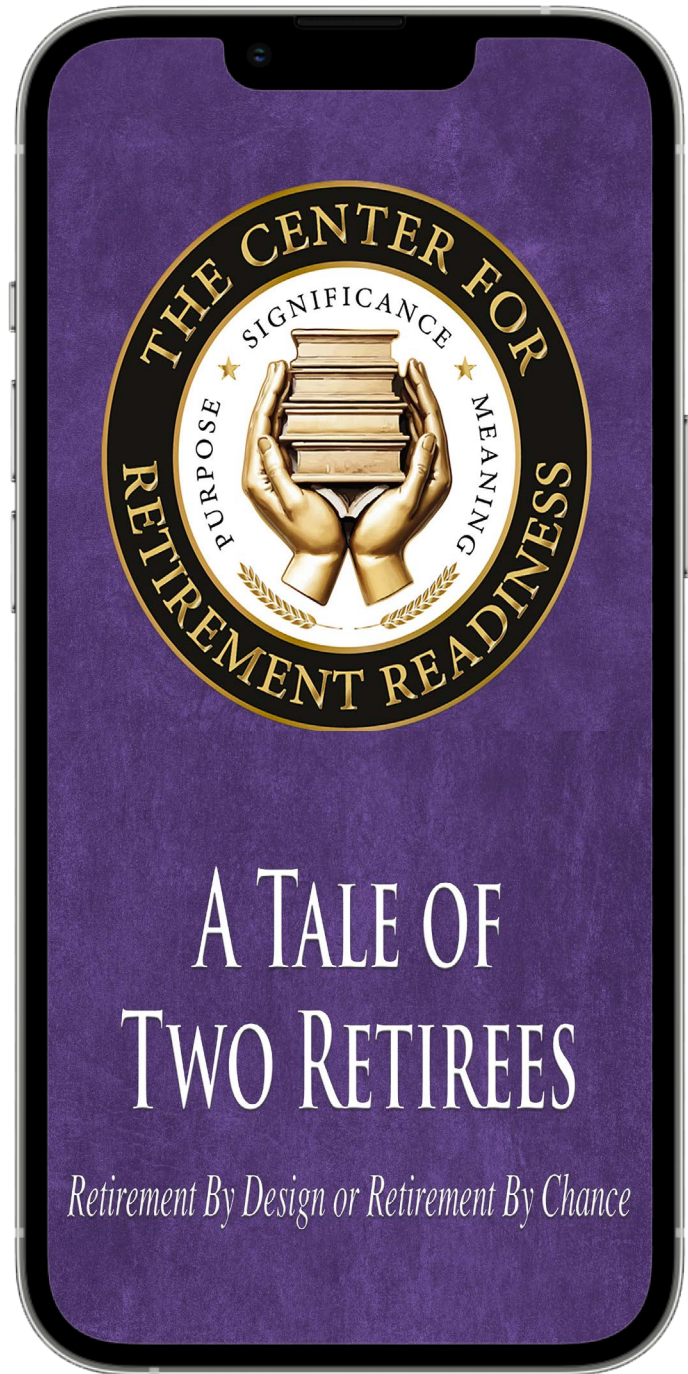
EXPERIENCE IT BOTH WAYS

Follow Along!

Read the words

Hear the story

Feel the difference.



Read While You're Listening.

[LISTEN NOW](#)

**SPECIAL
BONUS**

STEP 1

Begin Your Journey

Discover Where Your Retirement Journey Begins

Patti Lerch
Nora Hartquist
Shannon O'Connor

Retirement Educators
Retire Plugged In



Take our quick 3-minute **Purpose-Driven Retirement Quiz** to uncover your personalized starting point. You'll instantly receive a **one-page summary** highlighting key areas that may be holding you back.

TAKE THE QUIZ

Ready to explore further?

Schedule a complimentary session.

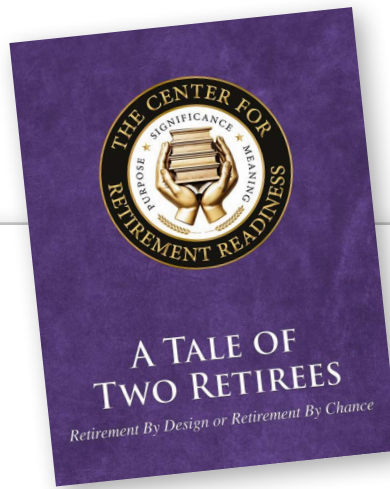
We'll use your summary as a roadmap to discuss both sides of retirement: the financial and the personal—your passions, connections, routines, and purpose.

Walk away with clarity, direction, and confidence for the road ahead—all at no cost or obligation.

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A Tale of Two Retirees

Retirement isn't just the end of a career—it's the beginning of a whole new phase of life.

For some—like John—it becomes a slow fade into boredom, loneliness, and regret.

For others—like Mary—it marks the beginning of a vibrant, purposeful, and deeply fulfilling new chapter.

This isn't just a story—it's a reflection. A reminder that every retiree faces the same choice.

One path drifts into uncertainty, anxiety, and loss. The other is designed with joy, connection, and meaning.

Both John and Mary had the same opportunities. Only one chose to embrace them.

The truth is simple: retirement is a blank canvas, and the paintbrush is in your hand.

So, the question becomes—what masterpiece will you create with this one amazing life you've been given?

A portrait of decline, or a life painted with discovery, purpose, and fulfillment?

Keep reading and decide which retirement will be yours.

The Center for Retirement Readiness



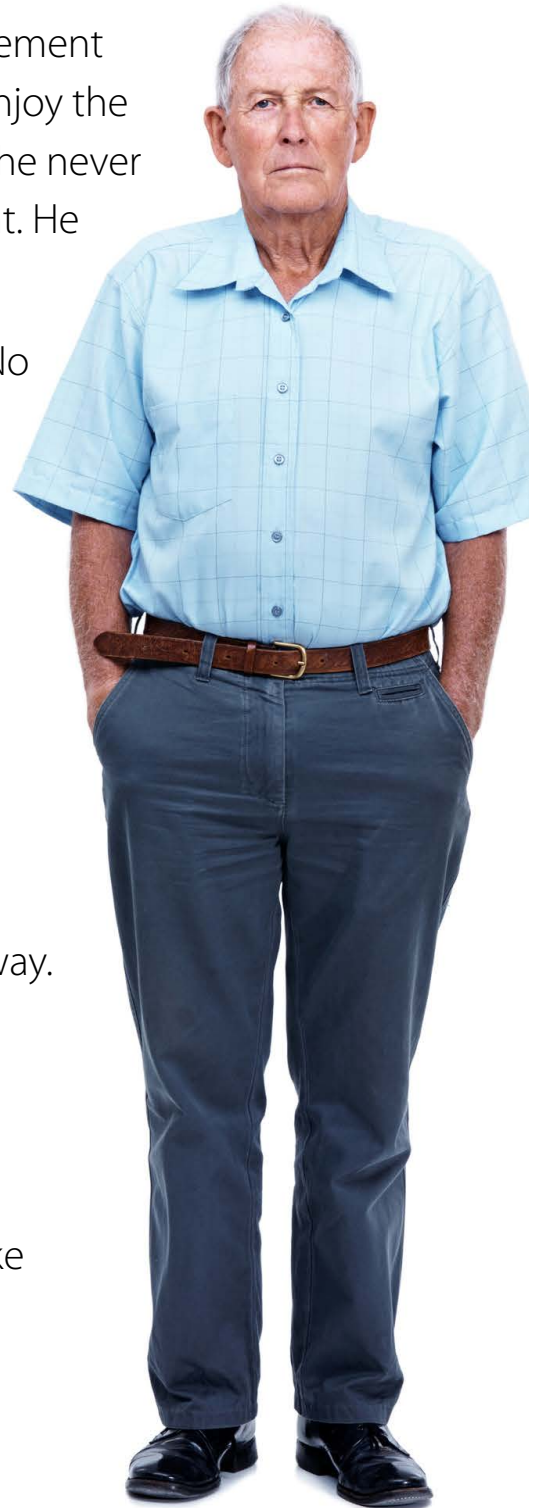
Retirement A: John - The Slow Decline Into an Empty Retirement

John worked hard his entire life. He believed that retirement was his reward—a time to finally relax, sleep in, and enjoy the fruits of his labor. But John made one crucial mistake: he never planned for the life he would actually live in retirement. He assumed money alone would bring happiness.

The first few weeks felt like freedom. No alarm clock. No deadlines. No office politics. But soon, the shine wore off. Days began to blur together. What once sounded like a dream quickly turned into a nightmare.

- Without a sense of purpose, John wandered aimlessly from one day to the next.
- Without meaningful activities, boredom sank in and robbed him of his joy.
- Without a community, he felt isolated, watching friends move on while his connections drifted away.
- Without direction, anxiety and depression began to gnaw at him.

John's health declined. Without motivation to stay active, his body grew weaker. Without a reason to wake up excited, his mind grew darker. He found himself looking back at his career and wondering, *"Was this all there was? Was my best life already behind me?"*



—John, 65

His finances, while enough to cover the bills, gave him no sense of peace. Retirement felt less like a reward and more like a sentence—a slow fade into loneliness, regret, and wasted potential.

John never claimed **The Free Retirement Readiness Exclusive Bundle** from **The Center for Retirement Readiness**. By not taking the 3-Minute **Purpose Driven Retirement Quiz**, John missed the opportunity to know where he stands and how his journey should begin. He never spoke with a **Purpose Driven Retirement Planner** to align his financial security with a life of meaning and fulfillment. He missed the chance to work with a **Life Architect** and walk through **The R.E.T.I.R.E. Method**—the first and only Purpose Driven Retirement Planning System in financial services today. Without that guidance, John's retirement turned into a nightmare that so many retirees fear - **empty, uncertain, and painfully unfulfilled**.

My financial advisor asked me, 'What are you going to do with your money?' But the question I needed to be asked was, 'What are you going to do with your time?'

—Frank, 66



STEP 2

Unlock Your Free
Retirement Readiness Kit

Get Your Complete Retirement Readiness Kit – Free!

Patti Lerch
Nora Hartquist
Shannon O'Connor

Retirement Educators
Retire Plugged In



Immediate Access • Cancel Anytime • No Cost to You • Delivered via Email

Access guides,
checklists, exercises,
and audiobooks to
design a retirement
that fits your
life—rooted in **purpose,**
passion, and joy.

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nothing to lose—and everything to gain.**

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Retirement B: Mary - The Joy of Living a Purpose-Driven Retirement

Mary's story couldn't be more different. Like John, she worked hard her entire life. But unlike John, Mary didn't leave her future to chance. She knew that money alone wouldn't guarantee happiness. She wanted her retirement to be her best chapter yet, not just her last.

So Mary took action. She took the 3 Minute **Purpose-Driven Retirement Quiz** to find out where she stood and where to start. She opted in to receive **The Retirement Readiness Exclusive Bundle**, and she didn't just skim it—she devoured it. She read every guide. She listened to every audiobook. She worked through every exercise in the bonus materials.

Instead of entering retirement blindly, Mary crafted a vision for her new life:

- She discovered her purpose, the “why” that gives her days meaning.
- She designed a routine that fuels her body, mind, and spirit.
- She built stronger relationships, staying deeply connected with friends, family, and her community.
- She embraced new passions—learning, traveling, mentoring, and giving back.



—Mary, 67

Mary wakes up each morning excited. Her health thrives because she makes movement and nutrition a joyful part of her life. Her mind stays sharp through learning and curiosity. Her heart feels full because she's living in alignment with her values and contributing to causes that matter to her.

Most importantly, Mary partnered with a **Purpose Driven Retirement Planner** that walked her through **The R.E.T.I.R.E. Method**. With a **Life Architect** guiding her step by step, this meant her **Financial Plan** and her **Life Plan** worked together seamlessly. As a result, she has confidence, clarity, and peace of mind - knowing that she is secure financially and fulfilled emotionally, socially, and spiritually.

Mary isn't just living longer—she's living better. Her retirement is full of health, happiness, healing, and longevity. Every day feels like a gift, and she can honestly say, "This is the life I always dreamed of."

"The Best Part is this: It doesn't cost a penny more to have a Purpose Driven Retirement Planner that focuses on both the financial and non financial side of retirement compared to a traditional financial advisor that only cares about your money."

—Naomi, 64



The Stark Reality

John and Mary had the same opportunity. But they made very different choices.

- John avoided planning. Mary embraced it.
- John fell into boredom, anxiety, and regret. Mary stepped into joy, purpose, and fulfillment.
- John let retirement happen to him. Mary designed the retirement she wanted.
- John lives a life of “what if.” Mary lives a life of “this is it.”

The difference? Mary started by taking the 3 Minute Quiz to discover her starting point. She took advantage of **The Retirement Readiness Exclusive Bundle** and the life changing guidance of a **Purpose Driven Retirement Planner** to walk her through **The R.E.T.I.R.E. Method**. John chose not to - and paid the price.

Conclusion

The question is simple: **Which retirement do you want?**

John's path leads to emptiness, regret, and decline. Mary's path leads to health, happiness, meaning, and a life she can't wait to wake up to everyday.

With a **Life Architect** by your side, and the results of the 3 Minute Quiz, this is the life that's well within your reach - if you'll tap into the wealth of resources available in **The Complimentary Retirement Readiness Exclusive Bundle**, and align your future with **The R.E.T.I.R.E. Method** under the guidance of a **Purpose Driven Retirement Planner**.

Don't gamble with your future. Don't risk your retirement and leave it up to chance. You've worked your entire life for this moment. You've earned it. Now, step into the life you deserve: vibrant, purposeful, and truly your own.

Living your best life in retirement is waiting. The choice is yours.

Which Retirement Do You Want?



Retirement A: John

- ⚠️ Boredom. Loneliness. Anxiety.
- ⚠️ Days that all feel the same.
- ⚠️ A life without meaning.



Retirement B: Mary

- ✅ Joy. Energy. Fulfillment.
- ✅ Connection. Purpose. Significance.
- ✅ A retirement worth celebrating.

👉 **Choose Retirement A: Do nothing.**

👉 **Choose Retirement B: Turn the page.** ➡️

Talk With A **Purpose-Driven** **Retirement** **Planner**

Patti Lerch
Nora Hartquist
Shannon O'Connor

Retirement Educators
Retire Plugged In



Welcome to **The Retirement Reimagined Series!** I believe retirement should be about more than filling your time—it should be about **living with meaning and purpose.**

If you'd like to discuss your goals or get a **second opinion** on your financial plan, schedule a **complimentary Discovery Call.**

BOOK MY TIME

Choose what works best for you:

- In-Person Meeting
- Zoom Video Call
- Phone Consultation

Let's create a retirement you can't wait to wake up to. I look forward to connecting with you soon!

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DISCLOSURE

Retire Plugged In Disclosure: <https://www.retirepluggedin.com>

Retire Plugged In is a membership site that provides pre-retirees and retirees with valuable information and resources to help you plan for a secure and fulfilling retirement. Reliable information on Social Security, Medicare, Federal Retirement, IRA's, Tax Rules, and much more are kept up to date as the rules change.

Don't miss out on the opportunity to gain access to expert guidance and support that can help you make informed decisions about your financial future. For those who prefer to learn the rules and make their own decisions, this is the place to find all retirement answers. We want to be clear we are not offering financial planning or financial legal advice. What we are offering is the education you need to make educated decisions about retirement with, more importantly, a detailed explanation of how to use it for your benefit. If you do feel you need a financial planner, we can refer you to one.