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Featured Advisor



Trinity Financial
Advisors, LLC
Principal

Trinity Financial
Advisors, LLC

City: Chicago

State: IL

BIOGRAPHY:

I began my career as a financial advisor with the AYCO Corporation. I then served eleven years with a Big four public accounting firm where I provided counseling services to corporate executives and other high net worth individuals. I founded Trinity Financial Advisors, LLC in late 1999. I am a registered CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL and a NAPFA® Registered Financial Advisor. I am also a member of the AICPA, FPA and IMCA. MY PRACTICE: Using a counseling-oriented approach, we begin by understanding your goals. We seek to first identify and prioritize issues, analyze them thoroughly and outline a program that meets your personal objectives. We take the time to build your confidence and trust, answer all of your questions ...

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Interview: Revitalizing Retirement--"The Mattering Matters," Says Author Nancy Schlossberg

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"A retiree is very much like a high school or college graduate (moving forward). You're getting a life. Some people know exactly what they want to do, while others aren't sure. It's the same with retirement. You are trying to figure out how to spend the rest of your life."

FRI, 11/08/2013 | BY DONALD LIEBENSON



"Revitalizing Retirement: Reshaping Your Identity, Relationships, and Purpose," by Nancy Schlossberg, EdD, takes a unique approach to retirement readiness. It focuses less on one's financial portfolio and more on their psychological portfolio. "Money," she laughs, "is not one of my strong suits. If anybody followed my advice, I do think they would end up in the poor house." But her insights in how to remain vital and engaged in retirement can be just as valuable.

Schlossberg, a vibrant 84 herself, thought retirement would be "a piece of cake," she says. A counseling psychologist and former a tenured professor at the University of Maryland for almost three decades, her field was adult development and aging. She has done many studies of how people deal with different life transitions. She voluntarily made the decision to retire following the retirement party of a colleague. "I was walking across campus between two deans," she recalls. "One said, 'She should have retired years ago.' This was a woman who was just terrific. I thought, 'Nobody will ever say that about me. I will retire before people ask why I am still there.'"

But she was "shocked," she says to initially find retirement to be very difficult. With her husband, who was already retired, they moved to Sarasota, Florida. "I was expecting all kinds of things to open for me," she says. "I know about psychology and transitions and I thought everyone would be clamoring for me to work as a consultant. It didn't happen that way."

During this period of struggling to figure out who she was, Schlossberg began to wonder if she was alone in what she was experiencing and feeling. "I had never studied a transition that I myself was going through," she says. In studying retirement, she found that "the struggle was not mine alone. The issue of identity is absolutely critical. I knew who I was, but you can't rest on past laurels. The fact that I was a professor and had written books didn't carry anything. I didn't know how to present myself."

Schlossberg interviewed almost 200 retirees and conducted focus groups. The result is "Revitalizing Retirement," in which she delineates "the psychological skills and tools you can use to identify and meet the challenges you'll face in your next phase of life," she writes.

The book deals with such key concepts as mattering and happiness in retirement, creating your own happiness, how to design and take stock of your own psychological profile, and how to create a lifetime of possibilities. "If you feel that you are appreciated and that you matter, you have the potential for a happy retirement," the book states.

In Schlossberg's case, she knew she would not be one to just sit back in her retirement

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years. "I had two fantasies," she told Spectrem's Millionaire Corner. "One was to be a salesperson at this wonderful, very expensive store here. The other was to go to Ringling College, take a course in interior design and work in low-income housing. Neither of these came through."

The struggle to redefine herself was an eye-opening experience, and one that taught her the importance of patience in finding her place and purpose. She knew she did not want to be a board member of some organization. She knew she wanted to stay involved professionally.

She describes herself at that time as "a searcher," one of several types of retirement approaches revealed in her research. A searcher is one who through trial and error explores new life options.

Others include:

- "Adventurers," who see retirement as an opportunity to branch out into new endeavors. "One woman I spoke with had been a homemaker, but she wanted to be a museum docent" Schlossberg said. "She took the training and is now qualified. She feels very good about that."
- "Continuers," who utilize existing skills to pursue their existing interests
- "Easy gliders," who are content not to have any agenda and to just let everyday unfold.

Schlossberg said she can chart the evolution of her retirement mindset through the business cards that have marked her journey. "My card from the University of Maryland was very pretty," she recalls. "I was the head of a center. When I entered retirement, I went to Office Depot and got a very plain card. My current card, because now I better know who I am, is a wonderful red orange with my name on one side and my website and other information on the back. It's very good looking."

Any transition takes time, Schlossberg said. Patience is not only a virtue, it's a necessity. "A retiree is very much like a high school or college graduate (moving forward)," she says. "You're getting a life. Some people know exactly what they want to do, while others aren't sure. It's the same with retirement. You are trying to figure out how to spend the rest of your life."

What Schlossberg hopes readers take away from "Revitalizing Retirement" is an understanding and appreciation that there are many options available for each individual to shift gears. "Retirement is an opportunity to explore," she said. "But it takes time to incorporate a transition in your life and craft a new way of being."

Baby Boomers, now entering retirement at a rate of about 10,000 per day, is a generation partly defined by its self-regard as being engaged and vital. This mindset is key to a happy retirement, Schlossberg says. "Feeling appreciated and noticed is so critical," she says. "In retirement, you need to feel that you're not being sidelined and what do you matters and makes a difference. It's the central construct of the book: The mattering is what matters."

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About the Author



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Donald Liebensohn writes news and features for Millionaire Corner. He has been published in the Chicago Tribune, The Chicago Sun-Times, The Los Angeles Times, Fiscal Times, Entertainment Weekly, Huffington Post, and other outlets. He has also served as a marketing writer for Chicago-based Questar Entertainment and distributor Baker & Taylor.

A graduate of the University of Southern California, he is married with a college-age son. He also writes extensively about entertainment.

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