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.
“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.)

Dychtwald, K., Ph.D.- Psychologist & Gerontologist, 2008
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
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.
“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

K. Dychtwald, Ph.D. 2008
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
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

Dychtwald, K. 2008
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

- **With Purpose: Going from Success to Significance In Work and Life** (2009), Ken Dychtwald, Ph.D.


- **My Next Phase: The Personality-Based Guide to Your Best Retirement** (2008), Eric Sundstrom, Michael Burnham, Randy Burnham, Michael Burnham, Randy Burnham