

Personal Preferences Inventory

Section 1—Parameters

1. Geography

- Do you have any commitments that constrain you geographically?
- What are your early thoughts about where you'd like to live all or some of the time?

2. Financial

Are there financial concerns or considerations that impact how you want to spend your Next Season?

3. Medical

- Are there any personal or family medical concerns or constraints that impact your plans?
- Are there any personal objectives you have for yourself physically that will impact your time/priorities after your transition?

4. Commitments You Bring with You

- Are there any groups, organizations, or people to whom you feel a strong commitment that you see yourself needing to honor in this Next Season?
- Who might those be?
- Approximately how much time does fulfilling these require?

5. Time

As you consider how you might spend time after you leave your current job, list things you have always imagined yourself possibly doing (for example, playing golf, speaking to audiences on favorite topics, reading three newspapers every morning, volunteering, reading novels, joining a gym, traveling, writing a book, taking classes, learning a language, working, spending time with grandchildren).

6. Your Definition of Success

- Sitting here today, describe what "success" looks like to you on the other side of this transition out of your organization.
- Describe any particular concerns you have about the transition.

7. Caring for Others

Do you have obligations or caregiving responsibilities that impact how or where you will spend your Next Season?

Section 2—The Highlights

Please complete the following sentences.

1. I love

2. I am happiest when

3. The following things have been the highlights of:

- My past year
- My past decade
- My most recent job
- My career
- My community life
- My marriage/partnership
- My children/grandchildren
- My friendships

4. Work accomplishments I am the most proud of:

5. Non-work accomplishments I am the most proud of:

6. A good day for me is one in which (check all that apply):

- | | | |
|---|--|---|
| <input type="checkbox"/> I have a schedule for the day | <input type="checkbox"/> I win in golf, tennis, or some other sporting event | <input type="checkbox"/> I do nothing too strenuous |
| <input type="checkbox"/> I am highly productive | <input type="checkbox"/> I have no schedule for the day | <input type="checkbox"/> I can work on my own things |
| <input type="checkbox"/> I organize something | <input type="checkbox"/> I can relax and not feel guilty | <input type="checkbox"/> I engage in familiar tasks/activities |
| <input type="checkbox"/> I can be creative | <input type="checkbox"/> I am invited and just have to show up | <input type="checkbox"/> I am at home |
| <input type="checkbox"/> I am intellectually stimulated | <input type="checkbox"/> I can accomplish something | <input type="checkbox"/> I am not burdened with problems/issues |
| <input type="checkbox"/> I socialize with people | <input type="checkbox"/> I do things that don't require me to think too much | <input type="checkbox"/> I can enjoy discrete visits with my children/grandchildren |
| <input type="checkbox"/> I am athletic | <input type="checkbox"/> I am alone or in the company of my spouse | <input type="checkbox"/> I enjoy time with friends playing golf, tennis, or some other sporting event |
| <input type="checkbox"/> I volunteer/help others | | |
| <input type="checkbox"/> I see/do new things | | |
| <input type="checkbox"/> I travel | | |
| <input type="checkbox"/> I solve problems | | |
| <input type="checkbox"/> I have extended time with children/grandchildren | | |

Section 3—The Lowlights

Create your personal "What Bugs Me" list.

1. What have been the lowlights of:

- a. My past year
- b. My most recent job
- c. My career
- d. My community life
- e. My marriage/partnership

Section 4—Legacy Matters

1. Let's say your old college friend is reading an update on graduates prior to attending your 50th college reunion. He is now reading what the reporter wrote about you. Complete your story beginning with the sentence . . .

After leaving a highly successful career at X company, <your name> _____ ...

During that time, <your name> also _____...

A close friend of <your name> said _____ about him/her...

You will most often find <your name> doing _____...

2. What "things" would you most like to impact in your lifetime?

- a. Are there any "causes" that you feel especially drawn to?
- b. Are there any not-for-profit organizations you would like to become more active with?
- c. Is there anything on your "What Bugs Me" list that you would be excited to tackle/change/fix?

3. How do you wish your children/grandchildren to remember you? How will they come to know your life stories, experiences, accomplishments?

Section 5—Things You Hope to Do Post-Transition

Check all that apply.

- | | | |
|---|--|---|
| <input type="checkbox"/> Have more leisure time | <input type="checkbox"/> Mentor/tutor young people | <input type="checkbox"/> Paint/draw |
| <input type="checkbox"/> Work out regularly | <input type="checkbox"/> Be outdoors more | <input type="checkbox"/> Garden |
| <input type="checkbox"/> Travel | <input type="checkbox"/> Cook (more often) | <input type="checkbox"/> Spend (more) time with children/ grandchildren |
| <input type="checkbox"/> Golf/tennis/other sports | <input type="checkbox"/> Entertain friends (more often) | <input type="checkbox"/> Coach/train |
| <input type="checkbox"/> Engage in extreme physical adventures | <input type="checkbox"/> Learn new language | <input type="checkbox"/> Write |
| <input type="checkbox"/> Volunteer (please indicate if you have specific ideas about with whom) | <input type="checkbox"/> Board service <ul style="list-style-type: none">o Publicly traded companyo Small/mid-size but establishedo Startupo Not-for-profito Private Equity/VC | <input type="checkbox"/> Photography |
| <input type="checkbox"/> Continue with a corporate career | <input type="checkbox"/> Not-for-Profit <ul style="list-style-type: none">o Board Membero Managemento Volunteero Special Projects | <input type="checkbox"/> Master new skill |
| <input type="checkbox"/> Start own company | | <input type="checkbox"/> Work with my hands |
| <input type="checkbox"/> Consult/advise | | <input type="checkbox"/> Be a caregiver to others |
| <input type="checkbox"/> Take classes, earn degree | | <input type="checkbox"/> Church/synagogue work |
| <input type="checkbox"/> Teach | | <input type="checkbox"/> Deepen my faith |
| <input type="checkbox"/> Lecture/speaking opportunities | | <input type="checkbox"/> Other.. |