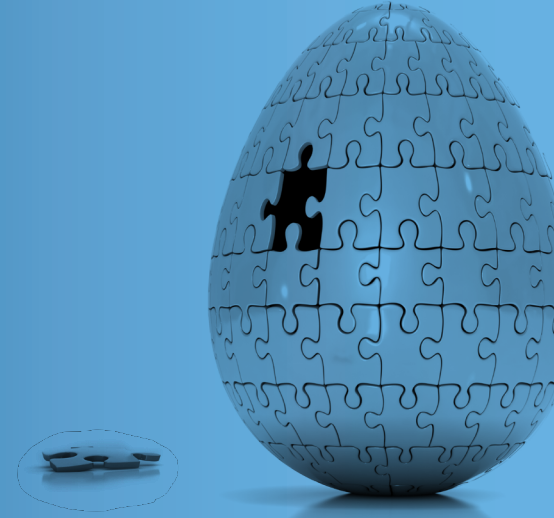


Purposeful retirement

Helping you retire from work, not life

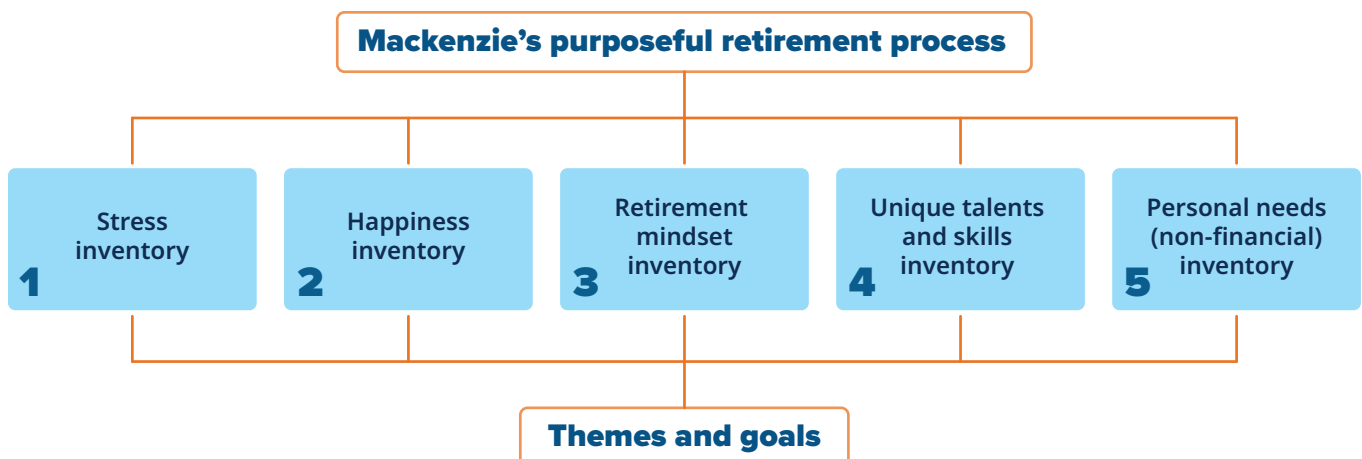


Is retirement not turning out as you expected? Are you struggling to fill your new-found free time in a meaningful way? Are there enjoyable aspects of your working life that you're finding hard to replace?

If you answered yes to any of these questions, you're not alone. Retirement is changing, with people living longer, being more active and looking to use their free time to contribute in more meaningful ways.

The transition from working full-time to having lots of free time in retirement can be surprisingly stressful. It can be difficult to replace the sense of purpose and feeling of belonging that work gave you. Being able to fill your time with meaningful and enjoyable activities that fit into your retirement budget can be a juggling act.

Your advisor can help you achieve this by taking you through Mackenzie's purposeful retirement workbook for investors. It's designed to help you identify activities that will provide you with a happy, fulfilling retirement, while allowing you to use your unique talents and skills.





1 Stress inventory

You may be among the many Canadians who are surprised at how stressful retirement can be, and the negative impact that stress can have on your overall mental and physical well-being. The stress inventory part of our process helps you to discover those areas of your retirement that are causing anxiety. Talk to your advisor about professionals who can help you manage and eliminate those stresses.

2 Happiness inventory

Happiness is a state of mind that we can often struggle to recognize in ourselves. Our happiness inventory begins by discovering contributing factors to your happiness, including optimism, a sense of freedom, proactivity, security, health, living out values, a sense of purpose and a feeling of appreciation.

Our tools measure your levels of happiness and discover areas of your life that have room for improvement and how to achieve it.

3 Retirement mindset inventory

Everyone experiences retirement differently. This inventory reveals how you're feeling about retirement and provides tools to help yours become more satisfying and purposeful.

4 Unique talents and skills inventory

This guide will help you identify your unique talents, skills and interests, which you can use to help you have a more fulfilling and meaningful retirement.

5 Non-financial personal needs inventory

This inventory helps you to build and rank a list of your most important non-financial needs, which will lead you to a happier retirement. These could include a sense of purpose, worth, belonging, routine, productivity and influence. We then explore strategies to help you meet those needs.

Talk to your advisor about Mackenzie Investments purposeful retirement process, to ensure that this next stage in your life is as meaningful and enjoyable as possible.

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