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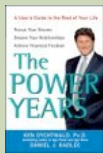
Retirement in the 21st Century: A Bibliography

Winter 2006

Editor's Note: RightPath Investments maintains a library of classic publications addressing a variety of wealth management, financial planning and investment subjects. We also endeavor to stay abreast of recent publications. One of the features of this newsletter is to provide reviews of well-written books and articles that are provocative, may become classics in their own right and are well worth spending the time reading in full. If you would like assistance in finding a relevant publication to your needs, please [contact us](#). We offer links for purchasing books featured in our reviews as a convenience to our readers; any proceeds received from related sales are donated to a literacy or financial education program.

So, you've been reading the other articles in this issue or just been doing a little thinking on your own. It occurs to you that you haven't really planned for what you want your retirement to be—not *really*. Panic sets in because you don't have a solid idea about how to start planning it, either. Let's face it: mapping out a retirement is not something that our society has good mechanisms for teaching us.

Other than the obvious suggestion of calling our office and enlisting RightPath's financial life planning services, we recommend that you start with the following list of resources. This bibliography offers a diverse library of eleven works addressing the gambit of mature life issues.



Ken Dychtwald and Daniel J. Kadlec. *The Power Years: A Users Guide to the Rest of Your Life*, (Wiley, 2005). This is the latest from Dychtwald, one of the early and leading thinkers in the realm of retirement planning. Contains great references, including a multitude of websites, to research further.



Mitch Anthony. *The New Retirementality: Planning Your Life and Living Your Dreams at any Age You Want*, (Dearborn Trade, 2001). Anthony is one of the Founding Fathers of the "financial life planning" Movement. This book is an excellent portal into planning a rich and rewarding retirement.



J. Peter Lindquist. *Solving the Retirement Puzzle: How to Get the Most out of the Rest of Your Life*, (Moonlight Publishing, 2005). New on the scene, Lindquist, from Colorado, passionately recounts the stories of 40 members of the "Retirement Puzzle Cohort" who have achieved varying degrees of satisfaction and success in their markedly different versions of retirement.



Elwood N. Chapman, revised by Marion E. Haynes. *Comfort Zones: Planning Your Future*, 4th Edition (Crisp Publications, 1997). A bit dated, but contains many exercises and worksheets which remain relevant to today's retirement model.



Stephen M. Pollan and Mark Levine. *Second Acts: Creating the Life You Really Want, Building the Career You Truly Desire*, (Harper Collins, 2003). A good guide to contemplating and launching changes—vocational and otherwise—later in life.



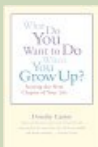
Jeri Sedlar and Rick Miners. *Don't Retire, Rewire!*, (Alpha, 2003). Don't flunk retirement. A step-by-step manual for taking on a new mindset toward making the dean's list in retirement.



Marika and Howard Stone. *Too Young to Retire: an Off-the-Road Map to the Rest of Your Life*, (The Writers Collective, 2003). Inspiration for those seeking fulfillment and meaning in the second half of life. They have a good website dedicated to "retiring retirement" at www.2young2retire.com.



Nancy K. Schlossberg, EdD. *Retire Smart, Retire Happy: Finding Your True Path in Life*, (APA Life Tools, 2005). A clinical approach from a counseling psychologist who deeply explores some of the emotional challenges of dealing with retirement, particularly relationship issues.



Dorothy Cantor. *What Do You Want to Do when You Grow Up? Starting the Next Chapter of Your Life*, (Little, Brown, 2001). Another psychological approach to retirement transition, with some good stories and motivating exercises.



Steve Weisman. *A Guide to Elder Planning: Everything You Need to Know to Protect Yourself Legally and Financially*, (Pearson Education 2004). This one is nuts and bolts, with straightforward discussions of asset protection, risk management, investments, taxes, long-term care and estate planning.



Roy Williams and Vic Preisser. *Preparing Heirs: Five Steps to a Successful Transition of Family Wealth and Values*, (Robert D. Reed Publishers, 2003). Research shows that 70% of intergenerational wealth transitions fail due to poor planning. The causes are, among others, poor communication, foolish spending, poor investing skills, mismanagement, incompetence and family feuding. This book is a great primer for instituting a process for overcoming these pitfalls.