Retirement Direction Report

PREPARED FOR

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SAMPLE REPORT

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PERFORMANCE PROGRAMS INC.
assessment, awareness, action

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About This Report

About PPI's Retirement Direction Report

Content in this report reflects responses to Hogan's Motives, Values, Preferences Inventory (MVPI), the Hogan Personality Inventory (HPI), and the Hogan Development Survey (HDS). The normative dataset used to drive this report's conclusions has >100,000 people and is used to identify common themes across individuals who answered the assessments similarly. However, each person is unique. Because of this, you might find a couple statements that may conflict or misalign. You are asked to focus on the primary themes emerging from this report as you think through this next chapter.

> *This Retirement Direction Profile translates your Hogan Personality Inventory (HPI), Hogan Development Survey (HDS), and Motives, Values, Preferences Inventory (MVPI) results into guidance for this next chapter. It's meant to be a starting map for thinking deliberately about what fits — not a verdict on what you can or can't do.*

Executive Summary

Your profile is distinctive: Altruistic and Tradition stand out as your strongest drivers, and the directions in this report are built around putting those to work in this next chapter. At the same time, Dutiful are elevated enough on the Hogan Development Survey to warrant real, early attention, since these are exactly the patterns that can derail an otherwise well-planned retirement. The guidance in this report is built around both halves of that picture.

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Your Everyday Style

The HPI measures the bright-side personality traits that predict how you typically behave day to day — the qualities family, friends, and colleagues notice first.

Scale	Level
Emotional Stability	**High**
Drive & Leadership	**High**
Extraversion	**Moderate**
IS	**Moderate**
Conscientiousness	**Moderate**
Curiosity	**Low**
Knowledge	**High**

What This Means for Your Retirement

Emotional Stability — High

You stay calm and steady when things get hard, and you bounce back quickly. This is a real asset at this stage of life — you can absorb the inevitable surprises (family needs, health news, financial shifts) without losing your footing, and the people around you will likely lean on you as the steady one.

Drive & Leadership — High

You still want to lead, achieve, and be recognized for results, and retirement won't change that easily. Look deliberately for roles with real influence and visible impact — chairing a board, running a venture, driving a campaign — rather than assuming you'll be satisfied drifting without a goal to work toward.

Extraversion — Moderate

You're comfortable with people without needing constant company, which gives you real flexibility — you can fill your calendar with groups and activities, or keep it quiet, and feel fine either way.

IS — Moderate

You balance directness with real consideration for others, which serves you well in mentoring, board work, and family roles alike.

Conscientiousness — Moderate

You can follow through on plans without needing rigid structure, which gives you a good balance between spontaneity and getting things done.

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Curiosity — Low

You're most engaged by practical, hands-on activities rather than abstract ideas or theory. Choose retirement learning and projects with an obvious real-world payoff — a garden, a repair project, a skill you can see progress on — over purely academic pursuits.

Knowledge — High

You genuinely enjoy formal learning and tend to seek out courses, credentials, and structured study. Lifelong-learning programs, certificate courses, and structured classes will likely be a strong, satisfying fit for your retirement.

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Under Pressure

The Hogan Development Survey (HDS) identifies how you behave under stress, when fatigued, or when your guard is down. These are not character flaws — they are predictable risk patterns, and the ones that are elevated are worth deliberate, early attention as you take on this next chapter.

Scale	Level
Volatile / Easily Frustrated	Low
Distrust / Cynicism	Low
Risk-Averse / Indecisive	Low
Aloof / Uncommunicative	Low
Passive-Aggressive	Low
Arrogant / Entitled	Low
Risk-Taking / Manipulative	Low
Dramatic / Attention-Seeking	Low
Eccentric	Low
Perfectionistic / Micromanaging	Moderate
Ingratiating / Conflict-Avoidant	High

Priority Patterns to Navigate

Scoring High on this survey means these patterns are the ones most worth deliberate, early attention: Dutiful.

What This Means for Your Retirement

Volatile / Easily Frustrated — Low

You're not especially prone to visible frustration or mood swings under pressure — a stable, even presence for family and friends navigating their own stresses.

Distrust / Cynicism — Low

You give people the benefit of the doubt and don't default to suspicion about others' motives, which

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makes you easy to work with on any board, project, or shared family decision.

Risk-Averse / Indecisive — Low

You're comfortable acting without extensive deliberation, which serves you well when retirement calls for a quick yes. Still worth double-checking big financial or health-related decisions before committing.

Aloof / Uncommunicative — Low

Even under pressure you stay open and engaged with people rather than shutting down — a real strength for keeping relationships warm through retirement's harder stretches, including supporting aging family members.

Passive-Aggressive — Low

When you disagree with a plan or request, you tend to say so directly rather than quietly resisting it — this keeps obligations honest and relationships clear.

Arrogant / Entitled — Low

You tend toward modesty and may undersell what you bring. Remember that boards, nonprofits, and former colleagues will likely value your experience more than you assume — let yourself say yes to roles that actually match your real level of skill.

Risk-Taking / Manipulative — Low

You're comfortable following through on plans as agreed and unlikely to take impulsive risks — useful when retirement decisions involve shared money or commitments with others.

Dramatic / Attention-Seeking — Low

You tend to stay out of the spotlight and let your contributions speak for themselves — reliable, but worth occasionally making sure your efforts are actually visible to the people who could use more of them.

Eccentric — Low

You tend to think in conventional, well-tested terms rather than unusual ones — useful for retirement pursuits that reward consistency over novelty.

Perfectionistic / Micromanaging — Moderate

You hold reasonably high standards without becoming rigid about them, which serves most retirement projects well.

Ingratiating / Conflict-Avoidant — High

Under pressure, you're likely to go along with others — family, board colleagues, old work relationships — even when you privately disagree. This can read as agreeable and easy, but it also means your real preferences for this stage of life may go unvoiced. Practicing how to say what you actually want, even when it isn't what's expected, will serve your retirement well.

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Core Motivators

The MVPI reveals what motivates you, what you find rewarding, and the kind of weekly rhythm where you're most likely to thrive. High scores indicate strong motivators; low scores indicate values or rewards that simply won't engage you, however sensible they look on paper.

Scale	Level
Visibility / Praise	Low
Control / Influence	Moderate
Pleasure / Fun	Low
Helping Others	High
Social Contact	High
Convention / Rules	High
Stability / Predictability	Moderate
Money / Profit	High
Style / Quality	Moderate
Data / Analysis	Low

What Drives You Now

Visibility / Praise — Low

Public praise and visibility aren't major motivators for you — you're just as content doing meaningful work quietly, with no fanfare needed.

Control / Influence — Moderate

Being in charge for its own sake doesn't drive you; making a difference does. Choose roles for their mission and results, not their seniority.

Pleasure / Fun — Low

Leisure and enjoyment for their own sake won't satisfy you for long — you want your time to add up to something, even in retirement's relaxing moments.

Helping Others — High

Helping others is a genuine and lasting motivator for you. Service roles — mentoring, board work,

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community causes — will give your retirement a real sense of meaning, and are worth prioritizing over purely personal pursuits.

Social Contact — High

You're motivated by social contact and connection, and isolation will genuinely cost you. Build real structure for regular time with people — standing groups, shared activities — into your retirement rhythm.

Convention / Rules — High

You respect established norms and institutions, and a more traditional, structured retirement rhythm will likely suit you better than an improvised one. Established clubs, institutions, and routines will feel more comfortable than ad hoc arrangements.

Stability / Predictability — Moderate

You're reasonably comfortable with change, though a clear financial and health plan will still help you feel grounded as you take on new things.

Money / Profit — High

You have a strong, straightforward interest in financial reward. A modest paid project, consulting role, or small venture will likely be more satisfying than a purely volunteer equivalent, even at this stage of life.

Style / Quality — Moderate

You appreciate quality, craft, and good design without needing it to be the center of your retirement.

Data / Analysis — Low

Data and rigorous analysis aren't a particular draw for you — practical, hands-on, or people-focused pursuits will hold your interest far better.

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The Three Seasons of Retirement

Retirement planners often describe three seasons. The Go-Go years are when energy and health support travel, big projects, and new starts. The Slow-Go years are still full and active, but closer to home and at a gentler pace. The No-Go years are when the circle narrows and comfort, connection, and support matter most. These are planning estimates, not predictions — your own health and energy will set the real timing.

Go-Go Years

Ages 65–75 · about 10 years

This is the window for your biggest adventures and most ambitious plans. Use it to pursue Community & Civic Causes while energy and health are at their best, and to build the habits that will carry you through the later seasons.

- Get moving on Community & Civic Causes
- Travel or take on your biggest new experiences now
- Build a lasting exercise habit

Slow-Go Years

Ages 75–85 · about 10 years

Life gets closer to home, and for most people that still means full and active, just at a gentler pace. Shift toward closer-to-home versions of your top pursuits, and lean into mentoring, lighter volunteer roles, and creative work.

- Shift to closer-to-home versions of your top pursuits
- Lean into mentoring and lighter volunteer roles
- Keep regular time with family and close friends

No-Go Years

Ages 85–91 · about 6 years

The focus shifts to comfort, connection, and legacy. The relationships, creative work, and stories you've built over the years will keep your world rich even as it narrows physically.

- Focus on comfort, connection, and legacy

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- Stay engaged through reading, creative work, and conversation
- Stay close to the people who matter most

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Recommended Retirement Directions

The directions below play to your strongest motivators and traits, while building in real guardrails for whichever risk patterns are elevated in your profile. Tier 1 directions are your highest-alignment paths; Tier 2 directions are worth considering as you settle into retirement.

TIER 1: Highest Alignment

1. Community & Civic Causes

This path channels your pull toward helping causes you believe in into regular, hands-on involvement alongside other people.

Best fits: Nonprofit volunteering, community organizations, advocacy and civic groups
Signature strength: A genuine pull toward causes you believe in, alongside people

GETTING STARTED

- Pick one cause you already care about and commit to a single volunteer role for your first season
- Set a standing shift or schedule rather than an open-ended commitment

Where to Find This:

- AmeriCorps Seniors RSVP, americorps.gov (search "AmeriCorps Seniors RSVP"), 800-942-2677 — matches adults 55+ with local organizations on a flexible schedule
- VolunteerMatch, volunteermatch.org — search local volunteer opportunities by cause and location

2. Service & Mentoring

This path channels your real experience and genuine care for others into direct, one-on-one impact.

Best fits: Mentoring, tutoring, professional coaching, nonprofit advising
Signature strength: Genuine care for others paired with real experience to offer
Watch: avoiding necessary pushback with authority figures when it matters most

GETTING STARTED

- Let former colleagues or your old organization know you're open to mentoring
- Pick one structured tutoring or mentoring program and commit to its training

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Where to Find This:

- Experience Corps (AARP Foundation), experiencecorps.org, 202-434-6400 — trains older adults to tutor children in reading
- SCORE, score.org — free, confidential small-business mentoring from volunteer mentors, backed by the U.S. Small Business Administration

3. Animal Care & Companionship

This path channels your care for others into hands-on work with animals — flexible, tactile, and usually low on bureaucracy.

Best fits: Animal shelter volunteering, therapy-animal visits, foster care for animals
Signature strength: Hands-on care paired with a genuine interest in animals
Watch: avoiding necessary pushback with authority figures when it matters most

GETTING STARTED

- Start with a regular shift at a local animal shelter to learn what fits before committing further
- If you have or plan to get a suitable dog, look into therapy-animal team registration

Where to Find This:

- Pet Partners, petpartners.org — national organization that trains and registers therapy-animal teams for hospitals, nursing homes and schools
- Local animal shelters and humane societies — most accept volunteers with no prior experience

TIER 2: Worth Considering

4. Structured & Traditional Pursuits

This path leans into established institutions and predictable rhythms, which will likely suit you better than an improvised, ad hoc retirement.

Best fits: Established clubs, civic or religious organizations, long-standing routines
Signature strength: Comfort with established institutions and a preference for predictable rhythms
Watch: avoiding necessary pushback with authority figures when it matters most

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GETTING STARTED

- Join one established club, congregation, or civic organization with a regular meeting schedule
- Build a weekly routine around its standing events rather than improvising week to week

Where to Find This:

- Your local senior center or council on aging — find yours via Eldercare Locator, eldercare.acl.gov, 800-677-1116
- Established civic organizations (Rotary, Kiwanis, Lions) and religious institutions in your community

5. Family & Close Connection

This path puts regular time with the people who matter most to you at the center of your retirement rhythm, rather than a packed social calendar.

Best fits: Standing time with family and close friends, shared projects, caregiving support
Signature strength: A genuine wish for a few close ties over a wide social circle

GETTING STARTED

- Set one standing date with a family member or close friend on the calendar, not just an open invitation
- Start one shared project (a family history, a recipe collection, a hobby together) that gives the relationship a regular reason to meet

Where to Find This:

- Eldercare Locator, eldercare.acl.gov, 800-677-1116 — connects families with local councils on aging and caregiving support if family needs grow
- Local senior centers and community programs for multigenerational and family-oriented activities

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Your Ideal Weekly Rhythm

Your MVPI and HDS patterns together predict the kind of weekly rhythm where you'll thrive versus struggle:

- A standing way to help a cause or people you care about, woven into the regular rhythm of the week.
- Established routines, institutions, and traditions that give the week a comfortable, familiar shape.
- A few dependable groups and standing dates with people you care about, rather than a packed or empty calendar.

Red flags for you in retirement:

- A retirement with no outlet for causes or people you want to help.
- A retirement with no consistent structure, routines, or institutions to anchor the week.
- Drifting into more isolation than is good for you, especially if money worries make you pull back from outings.
- Family or group dynamics where your real preferences never get voiced.

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Your First 90 Days

Whatever direction you pursue, the following steps are designed to build momentum early while putting real guardrails around your riskiest patterns.

Weeks 1-2: Clarify and Commit

Target Community & Civic Causes as a starting direction, and identify one or two concrete ways to get going — a class, a group, a first conversation. Write down, in your own words, what a satisfying first year would look like, so progress can be measured against something concrete.

Weeks 3-6: Build Your Foundation

Book a session with a financial planner to see a clear picture of what you can spend on new pursuits. Continue finding ways to get comfortable expressing disagreement. You aim to please but may not always feel able to disagree or debate with key stakeholders on high-stakes projects. To address this, first identify the types of conversations with those stakeholders that make you feel unable to push back or challenge the status quo. Try planning ahead for what you'll say, preparing with a trusted colleague, or preparing rationale and data ahead of time that support your perspective. Prepare yourself for the fact that you may need to reframe your point multiple times or be willing to press your point more forcefully when it comes to issues that are critical to a project or that will affect the overall well-being and workload of a team.

Weeks 7-12: Execute and Calibrate

Track what's actually energizing you against what you expected going in. Revisit whether your week matches the rhythm described in this report — a bad fit will surface fast, so don't wait a full year to course-correct.

Key Insight

Your profile has real, built-in upside for this next chapter: Altruistic, Tradition are exactly the traits that drive a satisfying, engaged retirement in the directions recommended above. But the same profile carries real risk patterns — Dutiful — that, left unmanaged, can undercut that upside before it has a chance to show. The single highest-leverage move available to you right now is choosing a rhythm with real structure, honest communication, and the guardrails named in this report — not because your energy needs restraining, but because every strength here is easiest to sustain with the right support around it.

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