

Uncovering Assumptions

Assumptions

So many things shift as you move into this new phase of your life. Discussing your assumptions and expectations about the everyday aspects of your new life is one of the important exercises you will do in building a successful retirement.

It will help you to be clear about how you expect your partner to behave. You will understand what your partner expects of you. It allows you to identify the topics where you have different assumptions and presents the opportunity to resolve them now before they become problems. It will ensure that you both are on the same page about how you will work together to accomplish your joint vision.

There are two parts to the exercise:

- Part 1: Prioritize the 5 areas of your life into the order you want to discuss them.
- Part 2: Think about, discuss, and agree on the topics within each area of your life.



Part 1 - Areas of Our Lives

Together discuss the order in which you want to approach these areas of your life.

Place a number between 1 and 5 in front of each area to indicate the order in which you would like to discuss them.

- _____ Affection, Emotion, Sex, Romance
- _____ Diet, Health, and Fitness
- _____ Family and Friends
- _____ Household Tasks
- _____ Time Together and Time Apart

We recommend that you print two copies of pages 12 - 19. Arrange the pages in the order in which you prioritized them above.

Instructions For Part 2

Meet Sam and Suzie. They just retired and are very excited about all that their new life has in store. They want to be sure they are in agreement about what their life will be like.

We're going to follow them as they work through one of the topics so you can see how the process works.



Instructions For Part 2

Step 1: Each of you should do this step separately. Think about your thoughts, feelings, issues, and concerns about the first Topic in your priority area. Record your thoughts under “My House”. Continue to the next topic until you have finished all of the topics in this area



Topic	Priority	My House
Which tasks needed to keep the house clean do you think your partner should do?		I used to do it all myself but now that Sam has more time I'd like him do at least half of the work.

Suzie's Sheet

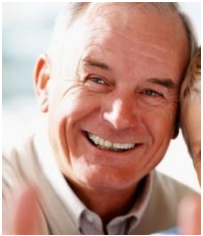


Topic	Priority	My House
Which tasks needed to keep the house clean do you think your partner should do?		I hate to do housework and want Suzie to continue to do it like she always has.

Sam's Sheet

Instructions For Part 2

Step 2: Partner's take turns doing this step. One partner begins by explaining his/her thoughts, etc about the first topic. The other partner listens and makes notes about what he/she hears his partner say under "My Partner's House".



Sam went first. He explained that he really does not want any part of doing the housework.



Suzie listened and wrote what she thought she heard Sam say under "My Partner's House".

Topic	Priority	My House	Our House	My Partner's House
Which tasks needed to keep the house clean do you think your partner should do?		I used to do it all myself but now that Sam has more time I'd like him do at least half of the work.		I hate to do housework and want Suzie to continue to do it like she always has.

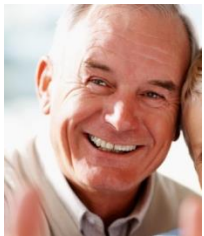
Suzie's Sheet

Instructions For Part 2

Step 3: Now it is the second partner's turn to explain his/her thoughts while the first partner listens and takes notes under "My Partner's House" on his/her sheet.



Next it was Suzie's turn to explain her thoughts.



Sam listened and wrote what he thought he heard Suzie say under "My Partner's House".

Topic	Priority	My House	Our House	My Partner's House
Which tasks needed to keep the house clean do you think your partner should do?		I hate to do housework and want Suzie to continue to do it like she always has.		I used to do it all myself but now that Sam has more time I'd like him do at least half of the work.

Sam's Sheet

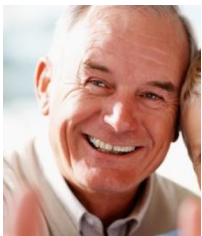
Instructions For Part 2

Step 4: Compare notes. Discuss any differences that arise. Take your time and be sure you both understand what the other has said. If you reach agreement about the topic, record the agreement under “Our House”.



My House	Our House	My Partner's House
I used to do it all myself but now that Sam has more time I'd like him do at least half of the work.		I hate to do housework and want Suzie to continue to do it like she always has.

Suzie's Sheet



My House	Our House	My Partner's House
I hate to do housework and want Suzie to continue to do it like she always has.		I used to do it all myself but now that Sam has more time I'd like him do at least half of the work.

Sam's Sheet

Sam and Suzie's expectations about this topic are pretty different.

Instructions For Part 2

After talking about it, they were able to reach an agreement that both of them were happy about and they recorded it in “Our House”.



My House	Our House	My Partner's House
I used to do it all myself but now that Sam has more time I'd like him to do at least half of the work.	We agree that Sam will help by vacuuming and mopping the floors.	I hate to do housework and want Suzie to continue to do it like she always has.

Suzie's Sheet



My House	Our House	My Partner's House
I hate to do housework and want Suzie to continue to do it like she always has.	We agree that I will help by vacuuming and mopping the floors.	I used to do it all myself but now that Sam has more time I'd like him to do at least half of the work.

Sam's Sheet

Instructions For Part 2

Step 5: Agree on the priority of the topic using the key below. Record it in the Priority column next to the topic.

H = High importance (Must have, non-negotiable);

M = Medium importance (An issue would arise this topic comes up if we don't reach agreement);

L = Low importance (Nice to Have but not necessary)

Topic	Priority	My House	Our House	My Partner's House
Which tasks needed to keep the house clean do you think your partner should do?	H	I hate to do housework and want Suzie to continue to do it like she always has.	We agree that Sam will help by vacuuming and mopping the floors.	I used to do it all myself but now that Sam has more time I'd like him to do at least half of the work.

- If Sam and Suzie were not able to come to an agreement about how to handle this topic, they should seek help in discussing and resolving how this situation would be handled. Medium and High Priority topics are highly likely to cause serious relationship problems in the future if they are not resolved now.

Recap

Topic	Priority	My House	Our House	My Partner's House
Which tasks needed to keep the house clean do you think your partner should do?				

1. Each partner should separately write his/her thoughts, feelings, issues, concerns about each topic. Use more paper if necessary.
2. One partner should begin by explaining his/her thoughts, etc about the first topic. The other partner should listen and make notes about what he/she hears his partner say under “My Partner’s House”.
3. Now it is the second partner’s turn to explain his/her thoughts while the first partner listens and takes notes.
4. Compare notes. Discuss any differences that arise. If you reach agreement about the topic, record the agreement under “Our House”.
5. Agree on the priority of the topic using the key below. Record it in the Priority column next to the topic.
6. If you are not able to reach agreement, set that topic aside for the moment and go on to the next topic.
7. Take turns being the first one to begin a new topic.

Priority Key:

H = High importance (Must have, non-negotiable);

M = Medium importance (an issue would arise this topic comes up if we don’t reach agreement);

L = Low importance (Nice to Have but not necessary)

Affection, Emotion, Sex, Romance (1)

Topic	Priority	My House	Our House	My Partner's House
Do you receive the right amount of affection? What would you like to see change?				
These are the traits that attract me to you today.				
Do you generally resolve conflict in a positive way? How can it be improved?				
I am concerned about these things in our emotional life.				
These are the things I'd like you to do less of:				

Affection, Emotion, Sex, Romance (2)

Topic	Priority	My House	Our House	My Partner's House
There are some areas of our sex life that I'd like to discuss.				
How often do you think we should have sex?				
Is there enough romance in our life together?				
I would like you to do more of ...				

Diet, Health, and Fitness

Topic	Priority	My House	Our House	My Partner's House
How often do you want to go out for dinner? What kind of places?				
When we are home who will do the cooking?				
How often do you intend to exercise, for how long, what time of day, where?				
What are your expectations about your partner's exercise program? Are there any concerns?				
What are your feelings, concerns about your weight and level of fitness and health?				
What are your feelings, concerns about your partner's weight and level of fitness and health?				

Family and Friends

Topic	Priority	My House	Our House	My Partner's House
How often do you expect to see your family? Where?				
How often do you expect to see your partner's family? Where?				
What are your expectations about friends coming to stay with us?				
How often do you want to do things together with mutual friends?				
How often do you expect your partner to go out with his/her friends without you?				
How often do you expect to go out with your friends without your partner?				

Household Tasks (1)

Topic	Priority	My House	Our House	My Partner's House
Which tasks needed to keep the house clean are you willing to do?				
Which tasks needed to keep the house clean do you think your partner should do?				
What household tasks should we share?				
How should the laundry be handled?				
How should we handle grocery shopping?				

Household Tasks (2)

Topic	Priority	My House	Our House	My Partner's House
Who should be responsible for picking up clutter that we leave around the house?				
How do you think repairs and maintenance should be handled?				
What tasks do you really dislike doing and prefer not to have to do?				
What tasks do you really enjoy doing?				
Who should pay the bills?				
Are there any other money or finance topics that need to be discussed?				

Time Together - Time Apart

Topic	Priority	My House	Our House	My Partner's House
The freedoms in our relationship that are most important to me are:				
The boundaries or limits I feel I must set regarding things like my hobbies, my time, etc are:				
The activities I would like to do together:				
The activities I would like to do by myself:				
What ways do you love to spend time together that you want to sure you continue?				

Other Topics You Want to Discuss

Topic	Priority	My House	Our House	My Partner's House

Retire and Be Happy

Marianne Oehser

Marianne @RetireandBeHappy.com

<http://RetireandBeHappy.com>

239-434-9900



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