

Staff Adventure: Tiffany’s New Adventure

First of all, I would like to express my love and gratitude for the client relationships I have built over the past six years. Thank you for letting me get to know each one of you. I will always remember and cherish our times together. I am truly fortunate to have worked with such wonderful co-workers, bosses and clients at Pathways.



Anthony, Mason, John, and Tiffany

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Paths to Creative Retirement Conference with the Osher Lifelong Learning Institute.

You may remember our blog post from February 10, 2014 about the Osher Lifelong Learning Institute (OLLI) offered at California State University Fresno. It is supported by the Bernard Osher Foundation and created exclusively for adults age 50+ eager to pursue erudition. There are no entrance requirements, grades nor exams; so “students” can learn in a relaxed atmosphere. The OLLI offers General Sessions and Short Courses that are open to members only, along with Field Trips that are open to members and non-members.

Two of our clients attended a three-day Osher Lifelong Learning Institute conference in Asheville, NC last August.

The subject of this conference was “Path to Creative Retirement”. Its purpose was to provide a facilitated environment for participants to explore their options regarding planning for retirement. The emphasis was not on financial matters. Instead, the focus was on creating a set of values and goals to enhance the quality of this time of life.

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Paths to Creative Retirement Conference with the Osher Lifelong Learning Institute.

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During the retreat, participants attended interactive sessions and exchanged ideas. Facilitators were retired volunteers trained to lead sessions. They shared their own experiences, and challenged the participants to step outside of their comfort zone. They even followed up with our clients three months and six months after the conference.

During those three days, participants were given a Retirement awareness quiz to assess their knowledge of retirement trends in the US before attending several small group discussions, and workshops. For example, in the “Mansion of the Soul” workshop, our clients were given the plan of a mansion. Each room represented an area of life (kitchen was lifestyle maintenance; garage was travel and hobbies etc.). Our clients were asked to allocate percentages to these areas to mirror their current time allocation and compare it to their desired future time allocation. They reflected on ways to achieve these new goals by assessing obstacles, opportunities, shifting values, and the impact on their loved ones. Another workshop called “RE-Locate” helped participants brainstorm a list of criteria for a new location, prioritize those criteria, and develop a list of tangible requirements for each criterion. For example, excellent health care might require a hospital with a national ranking, licensed health care practitioners, etc.

One client said the conference “did not change any of my plans or preconceived notions. It only confirmed and solidified my plans for retirement.” He is now more confident. The whole experience was about questioning one’s perspective on retirement. His favorite way of expressing that next stage of life is the word “rebooting”. He explains that when we reboot a computer, the programs are still there, they don’t change, but we might choose not to open some and to add new ones.

His wife approached the retreat in a different manner. She was, at first, reluctant to think about or discuss retirement, but after two and one half days, she realized that she had better tools in place to assist her in this next phase of life and felt ready to handle retirement.

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Both clients highly recommend this retreat. The facilitators were helpful; they were able to answer many questions. Overall, they had a great experience in a beautiful setting.

You may read more information on the OLLI website: <http://olliasheville.com/paths-creative-retirement>

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Over the past six years, you have watched my family grow as my husband and I welcomed two little boys into our family. With the encouragement and support of my family, I have decided to pursue my second career - teaching. Although I find Financial Planning interesting, I have no aspirations to become a Planner. My love of children and education led me to follow my heart and enter into the field of elementary education.

Starting this summer, I have the opportunity to begin my new career as a fifth grade teacher at Norseman Elementary in Fresno. My ultimate desire is to teach students in the primary grades and transition to a position in my home town of Reedley.

Although I will miss everyone at Pathways, I am anxious and excited to begin this new chapter in my life. I look forward to helping students actively engage and develop life-long learning skills. It is very rewarding to know I will be one of many who support and guide the young minds in our country.

Thank you again for welcoming me into your lives - I will carry these memories with me forever.

-Tiffany Domenici