

# *The Quest*

## **Enhanced Viewing and Discussion Guide**

*The Quest* DVD package is intended to be an unbiased and credible source of information about retirement and your *rest-of-life*. *The Quest* presents simple, effective strategies for enhancing your finances, health and life fulfillment that should work for most people. You're more likely to have a successful *rest-of-life* if you go on your own quest to learn about the relevant issues and make the necessary changes to improve your quality of life.

*The Quest* package has been designed to help you on your own quest and provides just the information you need to explore each of the three areas of importance: happiness, health and finances. This Guide helps you make the best use of *The Quest* package and is divided into these sections:

- Navigation Tips
- Topics for Further Discussion and Investigation
- Suggestions for Working in a Group (such as a book or investment club, or a group at work)

### **Navigation Tips**

*The Quest* package consists of the following components:

- *The Quest* DVD – 90 minutes
- *Making It Happen* bonus footage – 52 additional minutes
- *The Quest Action Guide* booklet – 30 pages
- Supporting information on our website: [www.thequestdvd.com](http://www.thequestdvd.com)

We suggest you watch and read *The Quest* package in the above order, although it's not essential. For the best understanding of the issues, you should consider viewing the contents of *The Quest* DVD, *Making It Happen* bonus footage, and *The Quest Action Guide* in their entirety. For more advanced study, see the resource lists in the *Action Guide* and the articles and tutorials on the website.

*The Quest* DVD consists of interviews with 12 experts in the fields of finance, health, successful aging and personal change. Because we believe you're more likely to be inspired if you see people like yourself who are committed to living to the fullest, the DVD also contains interviews with 13 people from all walks of life who are following the advice of the experts.

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There's no need to watch *The Quest* DVD in one sitting as you would with a movie--you can stop and start it at any point. You can also use the convenient "Selective Viewing" feature, which takes you to specified sections. If you go to a specific section from the Selective Viewing menu, when the section is finished playing, you'll return to the Selective Viewing menu. Here are the sections and their length:

Section of <i>The Quest</i>	Length
Introduction	7 minutes
A Better Approach	17 minutes
Happiness	10 minutes
Health	26 minutes
Finances	25 minutes
Close	5 minutes

The *Making It Happen* bonus material contains additional footage of the experts, which provides more ideas and insights. Again, the Selective Viewing feature can take you to specific sections. If you go to a specific section from the Selective Viewing feature of the *Making It Happen* menu, when the section is finished playing, you'll return to the *Making It Happen* menu.

Here are the sections and their length:

Section of <i>Making It Happen</i>	Length
Making Changes	6 minutes
Expenses	4 minutes
Social Security	3 minutes
Investments	11 minutes
Income for Life	9 minutes
Working	10 minutes
Insurance	3 minutes
Wrap Up	6 minutes

*The Quest Action Guide* booklet can act as a course of study for making the best of your *rest-of-life*. It contains checklists to plan for your finances, health and happiness. It identifies helpful books and websites for additional learning, and includes three short tutorials on the following subjects:

- A summary of Social Security benefits
- Making financial resources last for life
- Determining how much you need for a traditional retirement

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*The Quest Action Guide* booklet also identifies the experts, books and websites featured in *The Quest* DVD, so there's no need to write down the names while you're viewing. There's one exception to this; in the "Investments" section of the *Making It Happen* bonus material, Bob Powell mentions three helpful websites that contain lists for questions to ask potential financial advisors. These aren't listed in the *Action Guide*, so we've provided them here for your convenience:

- [www.napfa.org](http://www.napfa.org)
- [www.fpanet.org](http://www.fpanet.org)
- [www.sec.gov](http://www.sec.gov)

Our website, [www.thequestdvd.com](http://www.thequestdvd.com), contains additional tutorials and articles of interest on significant *rest-of-life* issues. Periodically we'll post additional information we think will help you on your quest. Also, since we're committed to helping people make important decisions about their *rest-of-life*, we invite your feedback and ideas for future projects.

### **Topics for Further Discussion and Investigation**

Some *rest-of-life* topics might be best explored on your own or with your spouse or significant other, such as financial analyses that involve your specific circumstances. For most topics, however, we think it's helpful to discuss them in a group to generate a variety of ideas and suggestions. There are other advantages to working in a group, such as a book or investment club:

- You can share the legwork investigating certain topics, and
- You might be able to share the costs of subscribing to helpful publications and websites or hiring professional advisors.

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Before starting any focused discussions, we'd like to suggest you review the relevant sections of *The Quest*. Here are several potential discussion topics and the relevant sections of *The Quest* package that cover those topics.

Discussion Topic	Relevant Parts of <i>The Quest</i> Package
What are your hopes, dreams, fears and concerns for the future?	<ul style="list-style-type: none"><li>• <i>The Quest</i> DVD - <i>A Better Approach</i></li></ul>
What important lifestyle changes should you be implementing?	<ul style="list-style-type: none"><li>• <i>Making It Happen – Making Changes</i></li></ul>
What things can you do to improve your health?	<ul style="list-style-type: none"><li>• <i>The Quest</i> DVD – <i>Health</i></li><li>• <i>The Quest</i> Action Guide booklet – <i>Health</i></li><li>• <a href="http://www.thequestdvd.com">www.thequestdvd.com</a> – tutorial on healthy eating</li></ul>
What steps can you take to save on living expenses?	<ul style="list-style-type: none"><li>• <i>Making It Happen – Expenses</i></li><li>• <i>The Quest</i> Action Guide booklet – <i>Finances</i></li></ul>
Should you consider working in your later years?	<ul style="list-style-type: none"><li>• <i>The Quest</i> DVD – <i>Finances</i></li><li>• <i>Making It Happen – Working</i></li></ul>

With the above topics, it can be particularly useful to share ideas in a group discussion. Here's an instance where many heads can be better than one!

When working with a group, in some instances, it might make sense for one person to do the initial investigation on certain issues and share what they've learned with your group. For example, they might read one or more of the books or explore the websites listed in the *Action Guide*. Be careful, however! You don't want to put the investigators in the position of providing advice. Instead, just let them share facts they've learned and the insights they've gained, and let them help you use the resources to make your own decisions.

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Here are topics for potential investigation.

Investigation Topic	Relevant Parts of <i>The Quest</i> Package
What can you expect from Social Security?	<ul style="list-style-type: none"> <li>• <i>Making It Happen – Social Security</i></li> <li>• <i>The Quest Action Guide</i> booklet – tutorial titled <i>Summary of Social Security Benefits</i></li> </ul>
How much financial resources will you need and how much you should save for your retirement years?	<ul style="list-style-type: none"> <li>• <i>The Quest</i> DVD - <i>Finances</i></li> <li>• <i>The Quest Action Guide</i> booklet – <i>Finances</i></li> <li>• <i>The Quest Action Guide</i> booklet – tutorial titled <i>When Can You Retire?</i></li> </ul>
How can you use financial resources to provide a lifetime retirement income?	<ul style="list-style-type: none"> <li>• <i>Making It Happen – Income for Life</i></li> <li>• <i>The Quest Action Guide</i> booklet – <i>Finances</i></li> <li>• <i>The Quest Action Guide</i> booklet – tutorial titled <i>Drawing Down Your Retirement Savings</i></li> </ul>
What investment products are appropriate?	<ul style="list-style-type: none"> <li>• <i>Making It Happen – Investments</i></li> <li>• <i>The Quest Action Guide</i> booklet – <i>Finances</i></li> <li>• <a href="http://www.thequestdvd.com">www.thequestdvd.com</a> – tutorial on <i>Investments to Avoid</i></li> </ul>
What insurance products are appropriate?	<ul style="list-style-type: none"> <li>• <i>Making It Happen – Insurance</i></li> <li>• <i>The Quest Action Guide</i> booklet – <i>Finances</i></li> <li>• <a href="http://www.thequestdvd.com">www.thequestdvd.com</a> – tutorial on <i>Long-Term Care Expenses</i></li> </ul>

With the above topics, there are many useful resources online. Here's where one person can learn how to use these resources and share helpful tips with the group.

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### **Suggestions for Working in a Group**

The topics discussed in the section immediately above lend themselves to group discussions and investigation, such as a work setting, a book or investment club, or a group of friends and family. It makes the most sense for all participants to first watch *The Quest* DVD in its entirety. Then, before each group meeting, review again the relevant sections to be discussed at that meeting and jot down questions and topics for discussion.

If you're leading or participating in such a group, here are some tips for making it work:

- Treat everyone with respect and compassion. There's no such thing as a dumb question or statement! Most people are doing the best they can, and they just need a little help and encouragement.
- When you schedule meetings, be clear about the topics to be discussed and the appropriate items to review to prepare for the meeting. Don't be too ambitious; one topic at a time may be enough.
- At the end of each meeting, write down the questions for further investigation, and be clear about who will do the investigating.
- Don't put yourself or others in the position of giving advice. It's okay to state facts as you understand them, share insights and show people how to use resources. It's not appropriate to tell people what to do, unless you're a professional advisor with the appropriate credentials. We all want to help, but sometimes you can hurt yourself and others by providing inappropriate advice.

Working with a group can be fun, and giving and receiving encouragement can help everyone succeed. However, in the end, each one of us must take responsibility for our own *rest-of-life*, and we must make our own decisions.

Good luck on your quest!