

WELL-BEING IN RETIREMENT— TURN OFF AUTOPILOT



FEATURE

By Kevin McGoff and Loreta Oleksy

It was a long day at the office. Lengthy calls with several justifiably needy clients interrupted last-minute trial prep. Court staff scheduled a hearing on a date that clashed with a planned vacation. I learned one of the kids forgot their lunch while I dined at my desk, tuned in to the computer screen—again. As the late afternoon partners meeting droned on, my mind attempted to unravel the most compelling way to argue a critical motion in the morning. I missed the MP’s message. It was probably the one about collecting stale AR.

I jumped in the car and rushed home for dinner, my brain spinning with the day’s unresolved problems. A half-hour later I pulled into our garage. As I shut off the car, I realized that I was so immersed in my day’s dilemmas that I had no idea how I, and the car, arrived home.

Have you ever driven home after a long and stressful day and realized you had no idea how you got there as you pulled into the driveway? Your brain knew the route and allowed you to weave through rush-hour traffic and navigate the highway to your home while you were concentrating on the day’s problems. It’s a bit scary. It happened to me more than once. I asked around and discovered that others have had the same experience. Sometimes careers are managed similarly.

CAREERS ON AUTOPILOT

J.M. Barrie mused in *Peter Pan* that “[o]dd things happen to all of us on our way through life without ever noticing for a time that they ever happened.” Many of us cruise along in our careers, trying cases, making deals, taking time for family, and otherwise living life only to wake up one day and think, “How did I get here and where am I headed?” Lawyers can wander through parts of life like Peter in Neverland, not certain how we arrived at the career moment where it is time to acknowledge the need to clarify what will be our next act.

I discovered that it was not unheard of for attorneys on the verge of retirement to have no plan for what to do when their briefcase was emptied and their collection of designer suits consigned to a second-hand store. Like me at one point, their personal and professional life is on cruise control. “Keep your eyes on the road, your hands upon the wheel.” Jim Morrison and The Doors



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contributed to the subject of lawyer retirement with this call to action in "Roadhouse Blues," unintentionally I suspect. Simple and sage advice. Disengage autopilot, turn your eyes toward the future, then grab the wheel and take charge of your career planning.

ARRIVE AT RETIREMENT PREPARED

Like any other endeavor, getting started is the most difficult step. Approach planning your retirement the same way you tackle a new

client's legal issues, and you will find that you have the skills to get this project off the ground. Do your research, talk to experts, map out your goals, outline your plan, and give each step a place on your calendar.

There's no shortage of books doling out retirement advice for you to turn to when beginning your research. The Indiana State Bar will soon add another handbook to the shelves—*ISBA Retirement and Succession Planning: A Guide for*

Indiana Attorneys. The manual will seed you with ideas, provide you with detailed checklists, and steer you in the right direction. There is no need to waste time inventing a new process. Turn to the available literature and start charting your retirement course.

I've never known a lawyer to say "no" when asked for advice. In addition to getting help from your financial advisor, accountant, and law partners, take a recently retired lawyer to lunch. I guarantee they

will share their opinion and tips on retirement from the non-working side of the table.

You've got to "put the pencil to it," my dad often said. I can't tell you how many times I heard this snippet being offered in our house when I was growing up. A staple from Dad's toolbox of pet phrases, not always favorably received. Strategic planning for any undertaking is going to take some work. Retirement planning, however, ought to be pleasant work. It's like organizing a long vacation to a place you've never been to but have long wished to visit. Get your retirement goals on the screen or paper and map out how to achieve them. Put the pencil to it.

DO THE PLANNING FOR YOU

Keep in mind that you have only yourself to please when it comes to deciding on a major change in your lifestyle. That's not to say you don't confide in those you love. For many, retiring is a joint decision. Significant others sharing your home have a stake in your retirement. We've all heard tales of retired professionals who grew weary of golf, tired of losing at poker, became bored with their stack of books, and sank to offering their wives tips on the proper method for vacuuming the living room carpet. Not the recipe for a happy and meaningful retirement.

You'll achieve a measure of satisfaction by using each day as part of your retirement strategy. You don't need to carve out hours for this endeavor. The thinking and planning can be relegated to 15 or 30 minutes at a time. Eating lunch at your desk again? Turn off your emails, shut down the beeps and buzzing notifications your phone is producing, and squeeze out a few moments to think about yourself.

It's not only about the self-satisfaction of having a plan and knowing where you are going in retirement. Loretta will describe how having a retirement plan is not only in your best interest but can contribute to your overall good health.

LIVE WELL NOW—RETIRE WELL LATER

I imagine Kevin's story of driving home on autopilot with no idea how he arrived there resonated with most of you. I know I've experienced pulling into my driveway—or the Kroger parking

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Mark often works with the class action and securities fraud teams for Starr Austen & Miller, LLP. He also specializes in premises liability, construction and vehicle accidents; having the benefit of working these cases from both a plaintiff and defendant perspective. Mark has found the representation of both sides rewarding and the insights gained from each has been extremely valuable for his other clients.

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"I can't serve my clients to the best of my ability if I'm not getting sufficient sleep and nutrition, getting regular physical checkups, staying connected to friends and family, engaging in interests outside the law, and caring for my mental health."

lot—and wondering how I got there or realizing I intended to go somewhere else. It occurs to me that Jim Morrison's sage advice boils down to the suggestion that we live with intention, or in other words, practice mindfulness.

If you're wondering what that means, you're not alone. Jon Kabat-Zinn, creator of Mindfulness Based Stress Reduction (MBSR), defines mindfulness as paying attention, on purpose, in the present moment,

without judgment. Put another way, "I am aware that I'm driving, my eyes are on the road and paying attention to where I am going, and I'm noticing my hands are on the wheel and steering me to where I want to go." In terms of the life of a lawyer or judicial officer, it also means paying attention to our overall well-being and intentionally engaging in what keeps us well.

The Institute for Well-Being in Law (IWIL) defines well-being as

a continuous process of seeking to flourish in each dimension of one's life. IWIL identified six dimensions. At Thought Kitchen we use seven: environmental, physical, social, emotional, occupational, intellectual, and spiritual. It's easy to get caught up attending to occupational well-being while pushing the others aside as less important or not related to work, but the truth is they are interrelated. I can't serve my clients to the best of my ability if I'm not getting sufficient sleep and nutrition, getting regular physical checkups, staying connected to friends and family, engaging in interests outside the law, and caring for my mental health. Believe me, I've tried, and it turns out that all work and no play not only make me dull. It may also impact professional conduct in one way or another.

BEING WELL INTENTIONALLY

The good news is that it also turns out that intentionally focusing on all dimensions of well-being throughout your legal career not only makes you a healthier, happier, and better lawyer, but also sets you up for having something to retire *to* and not just to retire *from*. Maintaining strong social connections, engaging in hobbies, staying physically and mentally healthy, and all the other ways you might support your overall well-being are more than just bling; they are an integral part of your retirement plan.

What kind of retirement will you enjoy if you have neglected your

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physical health, find yourself with few friends with whom you enjoy spending time, or don't know what to do or who you are if you aren't practicing law? The other good news is that it's never too early to start taking care of your well-being (I'm looking at you, law students) and it's never too late. Even if you've already retired and are noticing some dimensions of your well-being aren't optimal, every moment is an opportunity to begin again. Take a small step to support one dimension: read a book for pleasure, schedule that overdue doctor's appointment, watch the sunset, call a friend.

Incorporate well-being into your planning and planning into your well-being. You might find they are the same.

LET'S GET STARTED

Retire *to* something instead of retiring *from* the practice of law. Prepare for a healthy, happy, and productive retirement by investing in yourself. Block out time on your schedule and begin your research. Invite a recently retired friend to lunch this week. Pepper him or her with questions about the life they are now leading. Then put the pencil to it.

Nothing will happen without your investment in the project. Make the first move and devote some of your valuable time to retirement planning today. It is never too late—or too early—to get started. This is an investment you will never regret. ☺

Kevin McGoff is an attorney and the author of Find Your Landing Zone—Life Beyond the Bar, Chicago: ABA Book Publishing (2023), available on Amazon.

Loretta Oleksy is an attorney and social worker who helps people maximize their well-being in her role as a Mindful Life and Work Coach with Thought Kitchen LLC.

