

## Retire your way

### Westport company guides retirees beyond finances

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**WESTPORT** — Financial help and advice abounds for the retiree or soon-to-be retiree.

But what about the other, perhaps more important, aspects of retiring? The emotional adjustments? The psychological changes? Answering the nagging question: "What next?"

That type of help is not as easy to find, but it is out there. My Next Phase, based in Westport, is one such company.

Founded by brothers Dr. Randy Burnham and Michael Burnham, along with Dr. Eric Sundstrom, My Next Phase assists people in making the transition from career to retirement — although Randy Burnham prefers the term "next phase" to retirement.

"Money is the second-most important thing about retiring," Randy Burnham said. "You can have all the money you want, but if you don't know what you're going to do with the rest of your life, money doesn't mean anything."

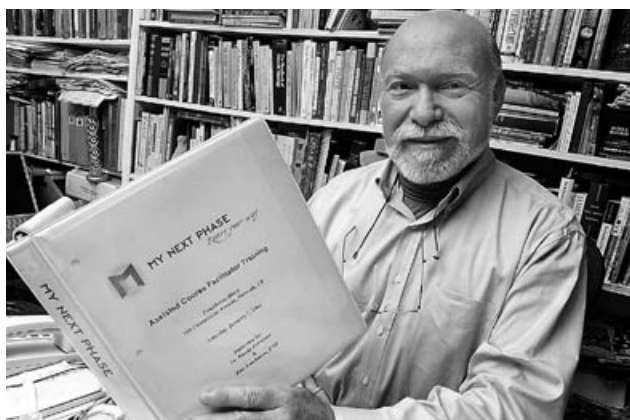
Through a patent-pending process that starts with an in-depth personality test developed by Randy Burnham and Sundstrom, My Next Phase gives clients options suited to their specific interests and needs. Perhaps it's a second career, perhaps it's volunteering, perhaps it's something else.

"It's scripted for a specific person's personality," Randy Burnham said. "We'll guide you in different directions depending on your personality."

Westport resident John Hooper went through the My Next Phase process about a year ago. When he retired three years ago from a research and development job with a division of Kodak, Hooper was bouncing from one thing to the next.

"I was doing quite a few different things," he said. "I was looking into possible employment and I was volunteering at a number of different places. My problem is that I can get interested in just about everything. The volunteer opportunities were like icebergs. It starts small and then you get deeper and deeper involved.

"(My Next Phase) was amazingly helpful," he added. "You get clear on the kinds of things you like doing and what you're good at. Finally, you start prioritizing. All of that was very useful to me. I stopped doing some things and started doing other things."



Dr. Randy Burnham, co-founder of My Next Phase, sits in his office in Westport.

Hooper had always been interested in looking into a local interfaith dialogue on science and religion. He got involved with the local Interfaith Council and even set up a lecture with a well-known speaker.

Now he is considering starting an interfaith group that would hold regular meetings.

"I'm more active in the faith community," he said. "Now I'm an officer doing a lot of things associated with that. I'm doing different things, but all in major areas of my interest."

Before contacting My Next Phase, Hooper was not sure what direction he wanted to take in his retirement. He did know, however, what direction he didn't want to go in.

"I had to be active," he said. "If you're not active you just kind of waste away physically, psychologically and spiritually. In retirement, you chose. There's no one telling you what to do. That's an advantage and a challenge."

In 1999, Michael Burnham faced a similar decision. He had recently sold a family business and wasn't sure what to do with the next phase of his life. Unable to find

an answer at the bookstore on the Web, he turned to his brother (a clinical psychologist) and Sundstrom (an organizational psychologist).

"No one was doing nonfinancial retirement planning," Randy Burnham recalled.

They spent the next six years developing the processes and principles behind My Next Phase.

Business is steadily growing for My Next Phase and, in addition to individuals, the staff is working with companies such as Ameriprise and Pitney Bowes.

"We're starting to get some traction at this point," Burnham said.

The timing for such a company is right, said Burnham, as millions of Baby Boomers have recently retired or on the cusp of retirement.

The first step in the My Next Phase process is "Understanding Yourself," according to Burnham.

The personality test will offer insights into various aspects of one's

personality and identify strengths and weaknesses.

Step two, "Balancing Your Life," gives participants an understanding of the areas which have brought fulfillment and outlines the challenges involved with retirement. In the third step, "Exploring Your Options," clients reflect on past interests and think of their dreams for the future. It also includes brainstorming options and creating a list of possible future pursuits.

Finally, "Redefining Your Role," is a tool for clients to use to plan a future that fits one's personality.

Clients may use My Next Phase on their own through the Internet, as an assisted program with My Next Phase staff, or with one-on-one coaching.

"There is so much anxiety that comes with retirement," Burnham said. "This is not because of a lack of planning, but rather a lack of appropriate planning. Retirees have not been addressing the emotional or psychological aspects of retirement."

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