

## EP 142 | **The 7 Pillars of Retirement Planning: A Practical Guide**

Retirement isn't just about your finances—it's about designing a life you love.

In this episode, Joe Curry and Lindsay Wilson break down the 7 key pillars of a fulfilling retirement, with a focus on the three most essential: your financial foundation, your health, and your lifestyle.

This is your practical guide to planning retirement with purpose—so you don't just coast through retirement, but thrive in it.

What You'll Learn:

- ✓ Why financial planning is the foundation of retirement freedom
- ✓ How to protect and extend your health span, not just your lifespan
- ✓ How to design a lifestyle aligned with your values and goals

Here's what you're in for:

00:00 The 7 Pillars That Make (or Break) a Successful Retirement  
02:08 Your Financial Foundation: Are You Really Prepared?  
06:27 The Real Secret to Staying Energized as You Age  
09:21 Rethink Retirement Housing: Comfort, Safety & Joy  
11:32 What Will You Actually Do All Day? (And Love It)  
13:19 Why Friendships May Matter More Than Finances in Retirement  
14:52 Legacy Isn't Just Money — What Will You Truly Leave Behind?  
17:31 Mastering the Mental Game: How to Stay Emotionally Strong  
18:56 Final Takeaways to Help You Retire With Confidence

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Ready to take the next step?

Identify your retirement income style with the RISA questionnaire at  
<https://www.retirementplanningsimplified.ca/blog>.

👉 Need help with retirement planning? Book a call with us at  
<https://www.retirementplanningsimplified.ca>

Don't forget to like, comment, and subscribe for more simplified retirement planning insights!

## ABOUT JOE CURRY

Joseph Curry, also known as *Joe*, is the co-host of *Your Retirement Planning Simplified*, Canada's fastest-growing retirement planning podcast, where he provides accessible, in-depth financial advice. As the owner and lead financial planner at Matthews + Associates in Peterborough, Ontario, he is committed to helping people secure both financial stability and purpose in retirement. His mission is to ensure people can sleep soundly knowing they have a solid plan in place, covering both financial and lifestyle aspects of retirement. A Certified Financial Planner and Certified Exit Planning Advisor, he values true wealth as more than money—it's about creating meaningful experiences with loved ones and fostering opportunities for the future.

You can reach out to Joe through:

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## ABOUT LINDSAY WILSON

Lindsay Wilson is the Client Care Coordinator at Retirement Planning Simplified and also the co-host of *Your Retirement Planning Simplified*, Canada's fastest-growing retirement planning podcast, where she and Joe Curry provide accessible, in-depth financial advice to retirees.

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## ABOUT RETIREMENT PLANNING SIMPLIFIED

Founded in 2022, its mission is to empower people to plan for retirement confidently, focusing not only on finances but also on a meaningful life. RPS wants everyone to have access to simple, reliable tools that reflect their values and priorities, helping them create True Wealth—the freedom to do what they love with those they love. By simplifying retirement planning and aligning it with the retiree's purpose, RPS aims to support building a retirement that feels fulfilling and secure.

To know more about RPS you can visit the links below:

- LinkedIn: <https://www.linkedin.com/company/retirement-planning-simplified/>
- Instagram: [https://www.instagram.com/retirement\\_planning\\_simplified](https://www.instagram.com/retirement_planning_simplified)
- Podcast/Blog: <https://www.retirementplanningsimplified.ca/blog>
- Youtube: <https://www.youtube.com/@retirementplanningsimplified>