



***“Providing Strategies for Success”***

**Boomer Nation Seminar Series**

***“60 Is The New 40”:***

**(Am-Aging Grace Living Strategies)**

**THE ACTIVE WOMENS GROUP**

**FITCHBURG COMMUNITY CENTER**

**APRIL 12, 2023**

**Presented by: John A. Vardalas/Founder/CEO**

**The American Boomer Group**

**Madison, Wisconsin [www.theamericanboomer.com](http://www.theamericanboomer.com)**

## *Session Objectives...*



- To look at how we 60 Plus Boomers will be Re-defining Retirement.
- To explore Age Disruptor Strategies.
- To Understand the Power of Keeping Yourself Moving.
- To Discover Resources to help you plan for making Lifestyle Changes for Your Successful Golden Years.

# *Demographic Trends in Dane County.....*



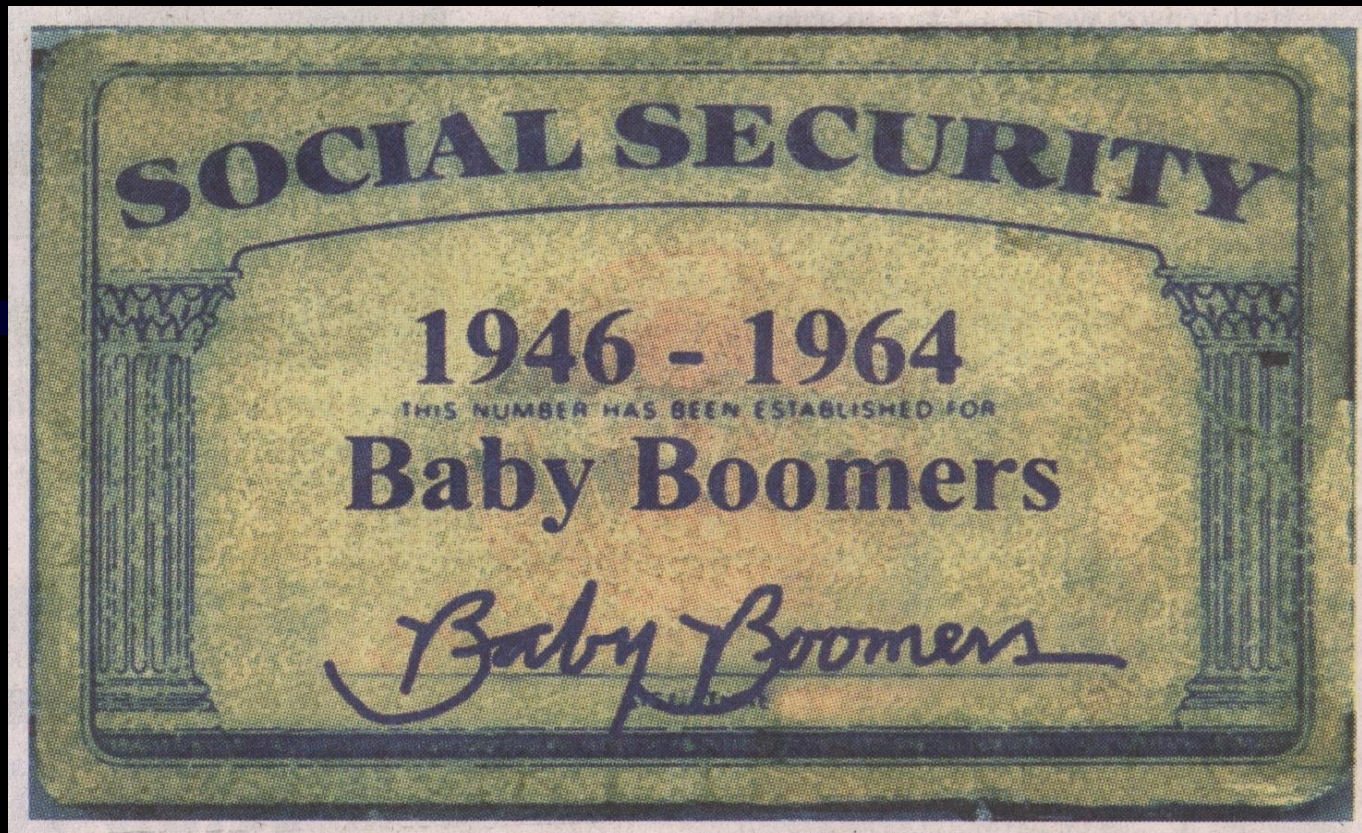
**According to the Dane County Task Force on Aging, the 60 + population in Dane County HAS increased to numbering more than 102,000 in 2022.**

**That's why we need to Focus on:**  
***“The Boomers”***

*As a Baby Boomer, Please list the Top 3 challenges you are currently facing...*

- 1)
- 2)
- 3)





# *Profile of Baby Boomers –* **(AKA the Me/Sandwich Generation)** *born between 1946 & 1964*

## Characteristics/Defining Events:

- T.V. (as an educational source)
- Born during a Prosperous Time
- Largest Generation (Almost 80 Million)
- Leisure Time
- 1<sup>st</sup> Generation to have a Recognized Childhood
- Viet Nam
- Question Authority
- Re-defining Aging



## *Current Facts on Boomers...*

- **Most powerful demographic group in USA in terms of influence and buying power**
- **Every 7 seconds someone turns 60 in USA**
- **Have tremendous Influence over parents/children**
- **Boomers stand to inherit \$10 trillion in the next 10years (Depending On \$\$ Trends)**
- **\$17 Trillion Plus in Boomer 401k Assets/IRAs & Pension Funds**

## *The Over 60 Are A “BIG MARKET”*

- 70% OF WEALTH
- 77% OF FINANCIAL ASSETS
- 50% OF IRAS/KEOGHS
- 40% MUTUAL FUNDS
- 66% OF STOCK MARKET
- 46% OF HOME EQUITY LOANS
- 40 MILLION CREDIT CARD USERS
- 41% OF NEW CAR PURCHASES
- 50% OF DISCRETIONARY SPENDING



# *9 Major Trends for The Boomer Generation*



- 1) Volunteerism/Active Lifestyle**
- 2) Commitment to Children/Grandchildren**
- 3) Nostalgia**
- 4) Spirituality**
- 5) Entrepreneurship**
- 6) Political Activism**
- 7) Learning For Self –Fulfillment**
- 8) Discovery Travel/Tourism**
- 9) The Bionic/Nip-Tuck Generation**

# **Boomers Have Real/Immediate Needs**

- Only One Third have Properly Prepared for retirement
- Many had children Late in life and have children at home and in college (Multi-Gen Households)
- Some are starting new Businesses
- Many are Care Givers taking care of parents/in laws
- Many are Single and will be aging alone
- They Want/Need Guidance on Money/Wealth Mgmt/Long Term Health Care/Continuing Ed

# *Redefining Aging: Work-Tirement*

In response to the New Economic Reality Some Boomers will be:

- 1) Working Longer
- 2) Starting Their Own Business (Boomerpreneurs)
- 3) Delaying Retirement
- 4) Looking for Additional Sources of Income
- 5) Combining all into

**“WORK-TIREMENT”**

# *The new Work-Tirement Model from 3 Legged to 5...*



The Previous generations Three Legged  
stool for retirement planning income  
Personal Savings, Social Security and  
Pensions has now been expanded to  
Five to include  
Maintaining Health and  
Job Skills/Competencies.

# *Mind/Body- How to Keep Up With Golden Years Activity...*

- **Keep Your Mind Active**
- **Be Curious of the World**
- **Engage Your Brain  
(read/puzzles/games/cards)**
- **Eat A Proper Diet**
- **Watch Your Weight**
- **Stay Active (walk/dance/travel)**
- **Maintain A “Bucket List”!**

# *Golden Years Activity...*

- Stay In Shape
- Be Physically Active
- Create A Regular Daily Routine for Health Maintenance
- Eat Right/Well
- Yoga/Meditation

## Activity Can Help Reduce:

- Risk of Chronic Diseases -  
Diabetes/Heart/Arthritis/High Blood  
Pressure/Balancing/Difficulty Walking  
(Shaking Your Booty Is A Good Thing)

# *You Don't Have to Join Princeton Club*



- **Take A Brisk Daily Walk**
- **Rake Leaves/Mow the Lawn**
- **Bike Ride/Take the Stairs**
- **Cruise Your Local Mall**
- **Visit Your Favorite Grocery Store**
- **Meditate**
- **Do Some Yoga**



# ***Good Nutrition Is Very Important...***



- **Eating Right Will Contribute To Living A Healthy Lifestyle**
- **Emphasis On Mediterranean Diet**
- **Lean Meats/Poultry/Fish/Beans/Nuts**
- **Low Saturated Fats/Cholesterol/Salt/No Added Sugars**
- **Maintain Healthy Weight**
- **The Mediterranean Diet**

# *Watch Your Lifestyle*

## *Reduce Your Risk Factors...*

### *Diet/Active Body Movement Can Impact Dementia/Deterioration:*

- Smoking
- Hypertension
- Depression
- Hearing Loss
- Weight
- Not Maintaining Important Vaccines

# *Be An Age Disruptor...*

**To Maintain Your Independence  
Stay Engaged with Family/Friends And  
Activities You Love...**

**“MOVEMENT IS MEDICINE**

**&**

**“MOTION IS LOTION”!**

**(Keep Moving Forward & Keep Going)**<sup>18</sup>

# ***Maintain A “Bucket List”!***

**List What Is Important To You and Want to do Before You Pass?**

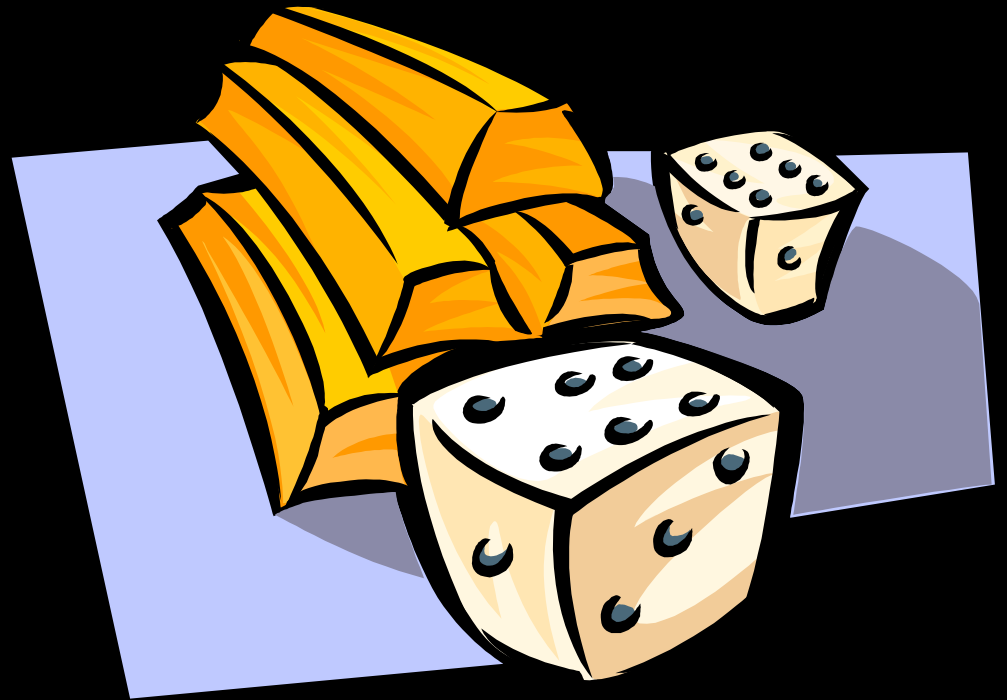
- **Travel Somewhere**
- **Take Up A Hobby**
- **Make A Difference/Volunteer**
- **Participate in Something**
- **Achieve Your Ideal (weight)?**
- **Spend More Meaningful Time With Family/Friends**

**(its ok to keep adding to your list)**

*And Always Remember...*  
*Hope Is Not A Strategy!*

There is no such thing as Luck  
(You Make Your Own Luck)

***Luck*** is when  
***Preparation***  
Meets  
***Opportunity!***



# *Suggested Strategies For Your Golden Years...*

- 1) Keep Yourself Healthy**
- 2) Do your Homework/Assess your Financial Condition and calculate what your Retirement Income needs will be**
- 3) Connect with a Trusted/Reputable Financial Services Provider**
- 4) Stay Engaged**
- 5) Keep a Positive Outlook**
- 6) Give Back/Make A Difference- Volunteer**
- 7) Start a Second Stage Career???**  
**(Maintain Your Skill Levels/Competencies)**

# *As You Continue Your New Journey Remember...*

- **GET IN TOUCH WITH YOUR INNER SELF**
- **FIND/DEVELOP YOUR NEW PURPOSE**
- **MAINTAIN YOUR PASSIONS**
- **PUT YOUR CREED INTO YOUR DEEDS!**

**And As We Age ...**

***“Health Is The True Wealth”!***



## *In Conclusion...*

**When Our Dreams Become Memories We  
Have Grown Old—**

**So Never Stop Dreaming!**

**“60 is the New 40”**

**&**

**Let's Make “70 The New 50”!**

# *And Finally...*

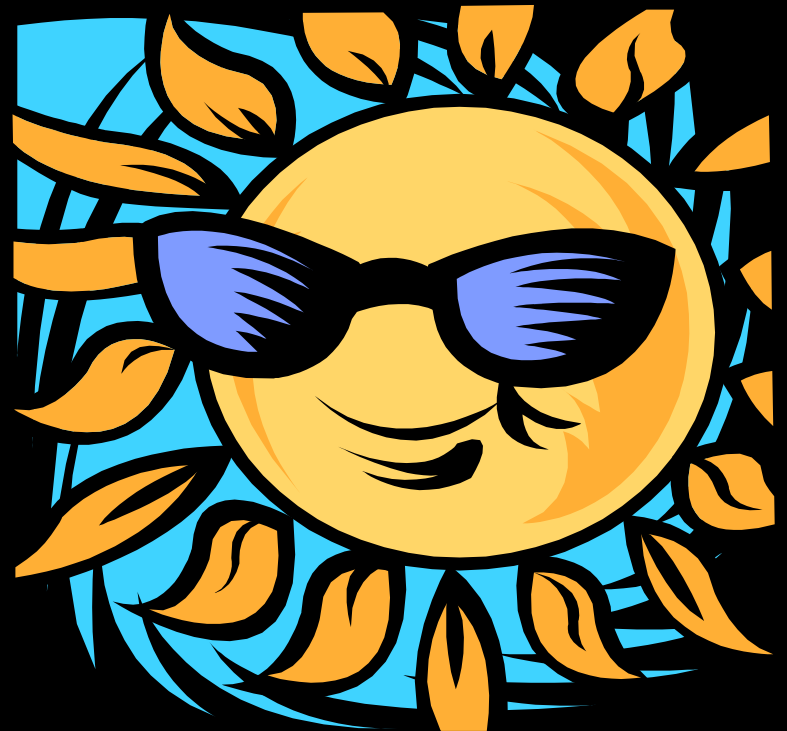
“Its not the strongest of  
the species that  
survives, nor the  
most intelligent, it’s  
the one that is most  
adaptable to  
Change”...

Charles Darwin



## *Boomer Open Forum...*

- **Thoughts,  
Questions,  
Discussion Items**



# *Specific Strategies for Me...*



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*Thank You For Your Attention & Input.  
I wish you Personal & Professional Success!*



# ***Boomer Financial/Life-style Resources for Making Changes...***

- AARP.org
- SSA.gov
- NewYorkLife.com
- MetLife.com
- Workforce 50.com
- [www.theamericanboomer.com](http://www.theamericanboomer.com)

# *About John A. Vardallas*

*Personal Mission: To Help Individuals & Organizations Reach Their Potential  
“Providing Strategies For Success”*

As an International Business Speaker/Consultant and Founder/CEO of TheAmerican Boomer Group, John leads a consulting and Internet Enterprise dedicated to helping global leaders and organizations reach their potential. His work as a speaker/trainer/consultant focuses on inspiring leaders and their staff to become more effective. An international trend watcher and provocateur, he also helps leaders synthesize industry trends and events into strategic organizational directions. John also works with organizations to become more “Customer/Member Centric”

He conducts Work-Tirement, World Class Service, Leadership, Change, Competitive Edge seminars and training for staff /board/and executive groups. He also facilitates Strategic Planning/Futuring sessions for business groups, national and international associations/organizations.

John enjoys hearing from people who share his “Higher Calling Passion” for helping organizations and Baby Boomers reach their potential and make a difference .

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