



WHOLE-LIFE CAREER CLARITY TOOLKIT

PRACTICAL TOOLS TO SUPPORT
CLARITY, PURPOSE, AND
ADAPTABILITY IN A LONGER,
CHANGING WORKLIFE.

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Introduction

Why This Collection Matters

Work is changing—rapidly, globally, and for all ages. People are living and working longer, and roles, skills, and expectations continue to evolve. Now, careers rarely follow predictable lines.

AEA's Whole-Life Career Clarity Toolkit will help you navigate these shifts with clarity and confidence and step into today's workplace with greater self-awareness, purpose, and adaptability.

Organizational change begins with personal insight. When individuals understand their needs, values, and aspirations, they are better equipped to advocate for themselves and contribute meaningfully to a longevity-minded workforce.

Use these tools to reflect honestly on where you are now, where you want to go, and what support helps you thrive. Every insight you gain contributes to a more equitable worklife—not only for you, but for everyone around you.

Tips for Success

Remember: there is no “right” pace. Reflection is progress.

1. Begin with Curiosity

Approach each tool without judgment. Your answers offer clarity, not critique. Reflection is a strength.

2. Move at Your Own Pace

Take in the questions and prompts slowly. Sit with them. Insight emerges when you create space for it.

3. Look for Themes

As you complete each section, notice what repeats: needs, desires, constraints, strengths, excitement, or questions. Patterns point to where alignment is strongest—and where small shifts might unlock something new.

4. Connect Insights to Action

Each tool ends with a reflection summary. Use these to identify one or two concrete actions you can take now. Small steps create momentum.

5. Share Select Insights (If Helpful)

You may choose to bring pieces of your reflection into conversations with your family, friends, manager, mentor, or colleagues. Personal clarity can improve communication, collaboration, planning, and commitment.

6. Revisit Regularly

The whole-life career evolves. These tools support recurring reflection as your needs, ambitions, and work rhythms change.

How to Use This Toolkit

Your worklife is unique. Whether you're currently employed, actively seeking employment, or re-entering the workforce after time away, this Toolkit is designed to meet you where you are. Use the guide below to determine which track will be most helpful as you move through each tool:

◆ **Track A: For Individuals Who Are Currently Employed**

Choose this track if you:

- Are working full-time, part-time, or on contract
- Want better alignment between your work and your needs
- Are exploring internal mobility or development opportunities
- Want to strengthen communication with your manager or team
- Are navigating workload, well-being, or rhythm adjustments

◆ **Track B: For Individuals Seeking Employment, Re-Entering Work, or Seeking a New Career Path**

Choose this track if you:

- Are currently unemployed but want to work
- Are returning from caregiving, health leave, or a career break
- Are pivoting into a new field or exploring re-entry pathways
- Want to rebuild confidence, update your narrative, or expand networks
- Are navigating age bias or worry that your work gap(s) will be judged

Both tracks share reflection prompts—because clarity is universal—but the action steps are tailored to your present situation.

This set of tools is designed to be flexible. You can work through them in one sitting or revisit sections periodically to renew your self-awareness or as your circumstances evolve.



Part I

Longevity Mindset Mini-Assessment

Longevity Mindset Mini-Assessment

Introduction

A longevity mindset begins with personal awareness. Before any of us can influence workplace culture, leadership behaviors, or organizational systems, we must first understand how we see ourselves—our growth, our purpose, our needs, and the rhythms that help us thrive.

The Longevity Mindset Mini-Assessment is a short, self-guided questionnaire aligned with AEA's longevity mindset principles. It invites you to take stock of where you feel strong and where you may benefit from more support.

Remember: sustainable careers are built with flexibility and agility, combined with continuous reflection and alignment.

Use this tool to help clarify what motivates you, what energizes you, and where small shifts could create significant impact in the direction your career unfolds.

Longevity Mindset Mini-Assessment

Instructions:

Rate each statement from 1 (Not true for me yet) to 5 (Very true for me).

A. Mindset & Attitudes

- I believe my career can have multiple chapters.
- I trust that my skills can keep evolving at any point.
- I see my experience as an asset that strengthens my contribution.

Subtotal A: ____

B. Learning & Skills

- I invest in refreshing or building skills regularly.
- I explore learning opportunities outside my immediate role.
- I feel confident asking for development support.

Subtotal B: ____

C. Purpose & Meaning

- I understand what makes my work meaningful.
- I intentionally seek work that aligns with my strengths.
- I revisit what purpose means to me as my needs evolve.

Subtotal C: ____

Longevity Mindset Mini-Assessment

D. Well-Being & Rhythm of Work

- I can adjust my work rhythm to match my current needs.
- I set boundaries that support well-being and effectiveness.
- I know what helps me restore energy and focus.

Subtotal D: _____

E. Relationships & Connection

- I have colleagues who support my growth.
- I intentionally build connections across teams or functions.
- I engage in mutual mentoring—giving and receiving.

Subtotal E: _____

Reflection Summary & Next Steps:

- Highest area: _____
- Lowest area: _____
- One action I can take this week: _____

Longevity Mindset Mini-Assessment

Note any insights that came to you while answering the questions. Any revelations?

Did you answer the questions with an age-neutral, needs-based approach? In other words, did you let go of assumptions about what you **should** be doing at any point in your life?

Personal clarity is not only empowering—it contributes to creating workplaces where everyone has opportunity to thrive.

Choose the track that best fits your situation today. You may move between tracks as your worklife evolves.

◆ **Track A – For Individuals Who Are Currently Employed**

- Choose one skill from your Skills section and explore internal development pathways.
- Take one small action to better align your work rhythm with your current needs.
- Seek mentoring or mutual mentoring that supports your growth or purpose direction.
- Talk with your manager about opportunities or responsibilities that align with your reflection.
- Identify one area where you can challenge an internalized belief and replace it with agency.
- Select one need from Part 2 and bring it into an upcoming conversation with your manager.

Longevity Mindset Mini-Assessment

◆ Track A (continued)

- Identify whether your "Growing," "Rebalancing," or "Contributing Deeply" category requires support.
- Explore one internal opportunity—project, training, ERG, or collaboration—that aligns with your reflection.
- Clarify expectations or priorities with your team to reduce friction or increase focus.
- Revisit this snapshot quarterly to track alignment over time.
- Identify one area where increased alignment would improve your well-being or performance.
- Schedule a brief check-in with your manager to discuss clarity, workload, or development.
- Explore internal learning or mentoring opportunities that support your lowest scoring area.
- Consider adjusting one boundary or workflow to support sustainable productivity.
- Share one insight with a trusted colleague or mentor to build connection and accountability.

Longevity Mindset Mini-Assessment

◆ Track B – For Individuals Seeking Employment or Re-Entering Work

- Identify how your strongest skills can be reframed as transferable value for future roles.
- Take one step to rebuild professional confidence—rewriting your narrative, practicing your pitch, etc.
- Take one action to strengthen your visibility (connecting with a former colleague, updating LinkedIn, etc.).
- Choose a realistic and sustainable re-entry step such as micro-learning, volunteer experience, or a short project.
- Replace one limiting belief with a new age-neutral statement you will use during your job search.
- Use your selected category (Exploring, Pivoting, Refining, etc.) to guide your job search focus.
- Identify one transferable skill from your reflection to highlight in applications.
- Choose one learning or re-skilling opportunity that aligns with your “right now” needs.
- Expand your network by reconnecting with one former colleague or mentor.
- Use Part 1 to guide conversations with career coaches, workforce centers, or networking partners.

Part I Summary

Self-awareness is a foundation—not just for your own growth, but for how you show up in conversations, relationships, and decisions. Change begins here, with noticing what you need to succeed and honoring it.

This snapshot gives you a clearer understanding of the factors shaping your work experience today. When individuals gain this clarity, they are more prepared to engage in productive conversations, make informed decisions, and recognize opportunities for growth or recalibration. At AEA, we emphasize that organizational change is most effective when employees and leaders are aligned—and that alignment begins with tools like this, where you deepen your own understanding first.



Part II

WHOLE-LIFE CAREER SNAPSHOT

WHOLE-LIFE CAREER SNAPSHOT

Introduction

A whole-life career is not linear. Your needs, energy, goals, and circumstances shift across your life, and your work should have the flexibility and adaptability to shift with you. The Whole-Life Career Snapshot helps you understand where you are right now – not where you “should be,” not where you used to be, and not where someone else thinks you belong.

This tool helps you identify your current needs and align them with the next best step. When individuals build this clarity, it becomes easier to communicate with others, advocate for support, and navigate worklife transitions with purpose.

WHOLE-LIFE CAREER SNAPSHOT

A. Where Am I Today

Check all that apply.

- I feel energized by my work.
- I want more learning or stretch opportunities.
- I need more clarity, feedback, or structure.
- I'm considering a change in my work or direction.
- My life outside work needs more space or flexibility.
- I want to make a bigger impact or contribution.
- I'm unsure what's next, but I want better alignment.

B. My Whole-Life Needs Right Now

Select the needs that feel most important.

- Skill development
- Purpose and meaning
- Well-being and balance
- Flexibility or rhythm adjustments
- New responsibilities or growth
- Stability or predictability
- Mentorship or coaching
- Stronger connection with colleagues or networks

WHOLE-LIFE CAREER SNAPSHOT

C. How I Experience My Career Right Now

Choose the description that feels most true.

- Exploring: I'm curious about new possibilities.
- Growing: I'm building skill, confidence, or responsibility.
- Refining: I'm strengthening my expertise or impact.
- Rebalancing: I'm adjusting my work rhythm to align with my life right now.
- Pivoting: I'm considering or preparing for a shift.
- Contributing Deeply: I'm applying my experience in meaningful or strategic ways.

D. Choose one action to take this month.

- Have a clarity conversation (manager, mentor, colleague).
- Identify a micro-learning opportunity.
- Reach out to someone I admire or want to learn from.
- Establish a weekly habit that supports my well-being.
- Clarify what success looks like for the next 60-90 days.
- Explore upcoming roles, projects, or opportunities.

WHOLE-LIFE CAREER SNAPSHOT

Reflection Summary & Next Steps

- One thing I learned about my situation...
- The need that feels most important right now...
- One step I feel ready to take...
- One barrier I may face – and how I might respond...

Choose the track that best fits your situation today. You may move between tracks as your worklife evolves.

◆ **Track A – For Individuals Who Are Currently Employed**

- Select one priority need from Part 2 and bring it into an upcoming conversation with your manager or mentor.
- Explore internal opportunities that align with your current experience category (Exploring, Growing, Rebalancing, etc.).
- Identify one project, responsibility, or collaboration that supports your reflection.
- Clarify team or role expectations to reduce friction and increase focus.
- Make one micro-adjustment to your work rhythm – meetings, boundaries, communication windows, focus time – to support sustainability.
- Revisit this snapshot every 2–3 months to track alignment over time.

WHOLE-LIFE CAREER SNAPSHOT

◆ Track B – For Individuals Seeking Employment or Re-Entering Work

- Use your selected “career experience” category to guide how you talk about this moment in your job search (e.g., “I’m exploring,” “I’m refining,” “I’m pivoting”).
- Identify one transferable skill and strengthen how you describe it in resumes, profiles, or conversations.
- Choose a small re-skilling or learning step that supports where you want to go next.
- Reconnect with one former colleague, classmate, or mentor to share your goals and gather perspective.
- Use your needs from Part 2 to guide conversations with workforce centers, coaches, or networks.
- Take one confidence-building step – practicing your pitch, updating your profile, or rehearsing your narrative.

Part II Summary

A Whole-Life Career Snapshot offers more than a moment of clarity—it helps you recognize the conditions that allow you to do your best work now. These insights can strengthen conversations with managers, mentors, and peers and help you choose actions that feel practical and aligned with your life. Sustainable careers grow from moments like this: when you take time to notice what you need, clarify what matters, and honor the direction you want to move toward next.



Part III

AGE-NEUTRAL CAREER PLANNING GUIDE

AGE-NEUTRAL CAREER PLANNING GUIDE

Introduction

Age-neutral career planning removes outdated assumptions about what people “should” be doing at any age or stage. It helps you reconnect with your agency and expand your sense of possibility across a longer worklife.

Every individual has the right to pursue meaningful work, growth, transition, re-entry, or reinvention at *any time*. This tool helps you challenge limiting beliefs, focus on what you need now, and take steps toward a sustainable, aligned worklife.

AGE-NEUTRAL CAREER PLANNING GUIDE

A. Spot and Replace Limiting Beliefs

Internalized age beliefs can limit your confidence, your narrative, and the opportunities you choose to pursue. These reflections help you reclaim agency across your whole-life career.

Instead of: "It's too late for me to learn something new."

Try: "My skills can evolve at any point — curiosity is my advantage."

Instead of: "I'm too early in my career to ask for that opportunity."

Try: "If I'm ready to contribute, I'm ready to ask."

Instead of: "I should be further along by now."

Try: "My career is mine to shape based on what I need today."

B. Career Planning Without Age Stereotypes

1. Focus on Skills, Not Age or Stages. Ask yourself:

- Which skills energize me most right now?
- Which skills do I want to deepen or explore?
- Which skills feel underused?

AGE-NEUTRAL CAREER PLANNING GUIDE

Action Step: Choose one skill to strengthen over the next 30 days and identify your first step – training, shadowing, micro-learning, or practice.

2. *Focus on Rhythm, Not Expectations. Ask yourself:*

- What do I need more of right now – learning, stability, flexibility, purpose, or support?
- What helps me operate at my best?
- Which expectations have I internalized that may no longer serve me?

Action Step: What one step can I take now that will move me toward better alignment with my rhythm?

Examples:

- Adjust a boundary
- Block recovery/focus time
- Clarify a priority
- Seek guidance for rebalancing workload or commitments

AGE-NEUTRAL CAREER PLANNING GUIDE

3. Focus on Opportunity, Not “Age Appropriateness.” Ask yourself:

- What opportunities align with my current goals and values?
- Who can help me move in that direction?
- What assumptions might be limiting me?

Action Step: Identify one person (mentor, peer, ally) to reach out to this month.

Reflection Summary & Next Steps

Skills

- One skill I want to deepen...
- One skill I want to explore...
- My first step will be...

Purpose

- What meaningful contribution looks like for me right now...
- One action that brings me closer to that purpose is...

Relationships

- Someone who can support my next step...
- Someone I can support or partner with...
- My outreach plan for the next 7 days...

AGE-NEUTRAL CAREER PLANNING GUIDE

Choose the track that best fits your situation today. You may move between tracks as your worklife evolves.

◆ **Track A – For Individuals Who Are Currently Employed**

Choose from the following actions:

- Select one skill from your Action Plan and explore internal development pathways (projects, training, shadowing, ERG involvement).
- Make one micro-adjustment to your rhythm – time blocking, communication habits, or meeting structure.
- Initiate a conversation with your manager about opportunities that align with your strengths, purpose, or growth direction.
- Seek mentoring or mutual mentoring to strengthen both confidence and capability.
- Identify and challenge one internalized belief that may be influencing your work decisions.

AGE-NEUTRAL CAREER PLANNING GUIDE

◆ Track B – For Individuals Seeking Employment or Re-Entering Work

Choose from the following actions:

- Translate your strongest skills into clear, transferable value statements for resumes, profiles, and interviews.
- Take one confidence-building action – practicing your introduction, updating your bio, or rewriting your narrative.
- Strengthen your visibility by reconnecting with one person in your network or joining a professional or community group.
- Choose one realistic re-entry step – micro-learning, volunteering, short-term project work, or skill practice.
- Replace one limiting belief with a new, age-neutral statement you commit to using in your job search conversations.

Part III Summary

Age-neutral planning helps you see your career with fresh possibility instead of limitation. By challenging outdated assumptions and replacing them with clarity and agency, you build a foundation for sustainable, purpose-driven work – no matter where you are in your worklife.

Your clarity does more than shape your next step. It contributes to a broader movement toward age equity, where people of all ages are valued for their skills, potential, and humanity.

Bringing It All Together

Your whole-life career will continue to evolve, and the clarity you build through these tools gives you a foundation for navigating change with confidence and purpose. Whether you are employed, seeking work, re-entering after time away, or exploring a new direction, these reflections help you shape a worklife that aligns with your needs, values, and aspirations.

At Age Equity Alliance, we believe individuals and organizations share responsibility for building workplaces where people can thrive at every age. Insights matter. Growth matters. And gaining clarity helps strengthen the movement toward best-in-class workplaces for all ages and workers in every life stage.

Company Partnerships

We partner with employers across sectors (and across the globe) to strengthen workplace culture, improve access to talent of all ages, and embed longevity-minded strategies that support retention, well-being, and performance.

Our offerings include interactive trainings, policy and culture reviews, the Longevity Mindset Index™, and tailored consulting to help organizations align practices with the realities of a longer, changing worklife.

👉 To explore partnership opportunities or bring AEA into your workplace, please contact AEA's Executive Director, Kristina Raner (kristina.raner@ageequityalliance.org) or any member of [AEA's Board of Directors!](#)

Thank You!

The team at Age Equity Alliance hope these tools supported your clarity, confidence, and sense of direction. We believe best-in-class, age-inclusive workplaces begin with individual awareness — and grow through collective action.

AEA's work is funded entirely by individual supporters, partners, and mission-aligned organizations—your support directly makes resources like this possible.

If this guide helped you reflect, reset, or take a meaningful next step, we invite you to support our mission. AEA is a small, US-based nonprofit working globally to strengthen workplace culture, talent sustainability, and unlock the potential of a longevity-minded workforce.

Your contribution — in any amount — helps us build workplaces where everyone has the opportunity to thrive — today, and across a longer worklife. It also makes it possible to:

- expand free resources like this toolkit
- support workers navigating bias and re-entry
- partner with employers to create age-inclusive systems
- amplify research and advocacy for age equitable work



Thank you for being part of the movement toward age equity.



AgeEquityAlliance.org

A RESEARCH-BASED NONPROFIT
WORKING WITH EMPLOYERS TO
CREATE BEST-IN-CLASS
WORKPLACES FOR ALL AGES.