

CHAPTER SIXTEEN

THE GOAL BEYOND

*Grow old along with me!
The best is yet to be,
The last of life, for which the first was made.*

—ROBERT BROWNING

The portfolio perspective on life is much about being happy. That may sound simplistic to some, but in my view, it comes down to that. Finding and doing what gives us fulfillment should be our ultimate goal. I really believe this, and so I was glad to learn that William James thought so as well. For most people, “How to gain, how to keep, how to recover happiness,” he said, is “the secret motive for what they do” (1994, p. 77). I don’t mean pleasure or self-satisfaction, or the feeling of being “up” or at the top of our game, although those things are good in themselves.

I mean the intangible sense of well-being that comes from knowing that you are living the life you have been given, that you have contributed something to the world, and that to the best of your ability you are realizing your unique gifts. The Japanese have a word for this, *ikigai*, which translates to finding significance and purpose in later life. By happy, I mean the answer that emerged from a 2004 study, “The Future of Retirement,” sponsored by the global bank HSBC. When eleven thousand people in ten countries were asked what contributed most to achieving a happy old age, the vast majority chose “loving family and friends.”

Life after fifty is a time when people who have not already done so accept that enduring happiness does not come from financial

success alone. The absence of money can drive us crazy, yet having it does not automatically mean we will be happy. It does not take money to be in what psychologists call the state of *flow*, or complete absorption in a task to the extent that we lose track of time. You can spend a fortune on a yacht or luxury vacation or fancy car and not get a lot of flow from it. Or you can be in that state without spending a nickel by gardening, hanging out with your grandchildren, or building model ships.

The actual form our happiness takes does not really matter. It could mean being a lawyer, a parent, a teacher, a manager, or a street sweeper who takes pride in what he does. A remark attributed to Bertrand Russell expresses it well: “Anything you’re good at contributes to happiness.”

Jack Wilson, a New Directions colleague who lives in Hilton Head, told of greeting a newcomer there. Jack said that when he asked the man what he did for a living, he replied, “I’m a tax adviser much of the time. But when I’m at my best, I’m a banjo player.”

I know that what Russell said is true, but I also wrestle with this. “Follow your bliss” can sound irresponsible or self-serving. If we serve ourselves, one might well ask, does that mean that we are *not* serving others? My answer is this: not necessarily. I find that those who connect to their deep resources and joy are more able and likely to help others. Surveys prove this. I have recently started to think that if happiness can be pragmatically shown to make the world a better place, if it can be rationally promoted as an incentive to giving, then maybe we should teach it and preach it more, have courses on it, set it out before young people as a life destination.

At the very same time, however, we have to be careful about treating happiness as if it were some kind of separate entity or isolated quality. It is not easily pursued as a goal in and of itself. Many of my own experiences of happiness come from being connected to others, sometimes being valued by others, even doing small things for others, like leaving the person who cleans hotel rooms or a taxi driver an oversized tip, or a two-second pause to make friendly eye contact with the turnpike toll collector. I have been privileged over the last twenty years to work with a number of passionate people. They have inspired others and me. One of my great sources of happiness is that I have possibly made a bit of difference

in their lives. So in a way, my happiness is a by-product of interactions that are larger than me.

Happiness is a conundrum. How, for example, do I explain to clients that volunteering as a job coach or mentor to homeless veterans or low-income people will make them happy? It tends to come out that if you do this (serve others), it will make you happy. But that does not fully explain scientific research that shows that when people feel happy—that is, when they are in a state of happiness—they are then more willing to help others. A team of University of California psychologists reviewed hundreds of studies over decades and found that “chronically happy” people are more successful in life and work. Their emotional state tends to make them confident, optimistic, and energetic—which also makes them more likable, increasing the chance of positive social connections. Sonja Lyubomirsky, lead author of the study, said past research has assumed a causal link: success leads to happiness. But her team found that this is not always true. A positive, happy outlook, she wrote, “can lead to success-oriented behaviors.”

I cannot untangle all these complexities, but I do know one thing. It is striking how many people tell me that they are unsatisfied, unfulfilled, or unhappy. I sometimes meet with clients who have a blank expression on their faces when I ask what makes them happy. “I’m not sure what happy means,” they say. Or, “Does it matter?” they ask.

One of them told me:

I’ve been so programmed to look at happiness as exceeding quota, making my numbers, pleasing customers, cutting overhead, and as a result of all that, hoping the stock will go up. Now those clear measures are gone. I don’t have a scorecard for being happy anymore. Where do I start?

Opinion research confirms that unhappiness is widespread. Surveys consistently show that about two out of three American workers are dissatisfied with their jobs. A broad survey conducted by the respected National Opinion Research Center found that the number of Americans reporting at least one major life problem edged up slightly—from 88 to 92 percent—from 1991 through 2004. Life spans have lengthened, prosperity and living standards have risen, but we seem increasingly torn by doubts about the qual-

ity of our lives. Those doubts are not only more widespread but seem to arise at an earlier age than ever. Maybe it is a positive sign that Generation X'ers and Y'ers are questioning received wisdom and looking for new paths. And perhaps rising doubt is explained by the fact that having mostly met our basic needs for food and shelter, we are more focused on the issue of personal fulfillment. Whatever the answer, the fact that the American drive toward greater material comfort and affluence has produced so much unhappiness is another paradox of happiness.

A phrase that resonates in my mind is the *pursuit of happiness*. This term, maybe this whole idea, has uniquely American roots. Thomas Jefferson put it in the second sentence of the Declaration of Independence. All persons "are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness." What did Jefferson mean? For starters, it had nothing to do with owning a Mercedes, getting a piece of some start-up's initial public offering, or having a house larger than an aircraft carrier.

I have always had a great interest in American history, and not just about politics and major movements but the stories of how people lived their lives. When I read about the people of that era, I know that signature phrase must have meant something beyond acquiring things. Back then, it was a radical idea that people should get to decide for themselves what they wanted to do with their lives, what had meaning and value, and what was thus worth pursuing. That was the job of the king or the church. So what did they pursue? Money, of course, and why not? But money was only one of the things Americans wanted back then. They had commitments to one another, to their religious beliefs, to their ideas and ideals about honesty, thrift, service, and caring for others.

I am afraid that the "pursuit of happiness" that most comes to mind today is but a cheap knockoff of the real thing. Accepting the ersatz "he-who-dies-with-the-most-toys-wins" version of this Jeffersonian dream has not made too many people happy. I have learned that again and again. Discovering misplaced priorities or shallow goals can be a disturbing thing for people past fifty years of age. But that is only the bad news. The good news is that the period in life that we used to call *retirement* is an opportunity to find out what really makes us happy. Tom Hagan of Covington, Ohio, found out. When Hagan turned fifty-six, he sold his own pharmacy

business and took a different job within his industry that paid less but demanded fewer hours and gave fewer headaches. “The secret to life is being fulfilled,” he told an interviewer for the local newspaper. “It has nothing to do with money. I have friends who are worth \$50 million who are miserable. I love my life. I’m still working, and I plan to work until I die.”

Clients pursuing the portfolio path have told me similar things. Their words suggest that the rainbow of life may have a pot of gold on the far end if we look for it. “To me, happiness is the satisfaction from giving back, mentoring,” said one portfolio client who volunteered for us.

I believe in the link between a sense of purpose and happiness. However, I recognize that there is no surefire recipe. Happiness may come in stages, first as one awareness or experience, then as another. When people begin to live out their life portfolio, happiness may arrive as a feeling of release. That is how a former partner at a Chicago law firm described it to me.

“I’m happy now that I’ve got my feet comfortably planted in midair!” he said. “No meetings, no joining in the conference room. The knot in my stomach’s gone. I love walking around without it. It’s liberating. I walk by meeting rooms filled with lawyers and I could care less what’s going on!”

If we channel this exuberance into pursuits, other paths to happiness will appear when the novelty of freedom wears off.

What makes me happy? I have always loved setting and meeting goals. Crossing off items on my “to do” lists makes me happy. Done. An accomplishment! I get happiness from giving people good news. Increasingly, and maybe this is part of my own portfolio awakenings, happiness is not rushing as much. Focusing line by line when I enjoy a book rather than scanning it for points. Paying attention to people and details I have missed at another time in my life. Not always climbing the mountain. Trying to be fulfilled by reaching small goals along the way.

OUR NEGLECTED CALLINGS

Charles Francis Potter (1882–1965) was a minister and Bible scholar who wrote a book addressed to older people called *Technique of Happiness* (1935). At the time, people thought nothing of

describing someone of sixty years of age as “elderly,” and Potter does so. That might tempt a reader today to slam the book shut. But if we grant the difference in longevity then and continue reading, we find that the minister has more to say.

Potter calls finding an outlet through which to express our true selves “the field to cultivate for later happiness.” People in their sixties are often disappointed that a quick review “reveals no one great thing done” in their lives, he writes. But the man who “takes inventory and devotes himself for weeks and months to self-examination [which I call assessment] may discover some neglected element which, when brought into its proper place, may transform his life” and reveal his true calling.

Some desire in boyhood that got buried because of other interests may suddenly appear again. It may prove to have been his true bent, his real calling, and even the man of sixty, perhaps especially the man of sixty, ripened and strengthened by life experience, may take this boyhood ambition and in a surprisingly short time find himself doing more with the thing than he could have as a boy [Potter, 1935, p. 201].

That passage concludes, “We have many second chances in life, sometimes even tenth chances.” I was thrilled to read that, because life portfolios are really about chances two through ten—and beyond.

I have talked a lot about happiness but have not given much advice, so allow me to close with some. Do not chase happiness. The success of a chase can usually be seen afterward fairly quickly. We got what we sought, or we did not. But with happiness, we sometimes do not know we have it until much later. So rushing at it will not work. Pursue other worthwhile goals, and let happiness come to you. Look for new opportunities to apply or refine what you do best. Tackle challenges that are meaningful to your life and your age now. Jonas Salk, who invented the polio vaccine, was once asked what his main goal in life was. Salk replied, “to become a good ancestor.” That’s a goal worthy of portfolio or any stage of life, one that almost surely leads to happiness. It is not an easy one, but creating and living out your own *life portfolio* might be a meaningful way to start.

