

# The Social Portfolio

	<b>GROUP EFFORTS</b>	<b>INDIVIDUAL EFFORTS</b>
<b>HIGH MOBILITY HIGH ENERGY</b>	<p><u><i>GROUP/HIGH MOBILITY</i></u></p> <ul style="list-style-type: none"> <li>• Participating in an ongoing Dance or Theater Group</li> <li>• Traveling with a Life Long Learning Group</li> <li>• Joining a Community Outreach Advocacy Group</li> </ul>	<p><u><i>INDIVIDUAL/HIGH MOBILITY</i></u></p> <ul style="list-style-type: none"> <li>• Creating a Neighborhood Showcase Garden</li> <li>• Developing an Annotated Walking Tour of your Town</li> <li>• Doing Documentary or Nature Photography</li> </ul>
<b>LOW MOBILITY LOW ENERGY</b>	<p><u><i>GROUP/LOW MOBILITY</i></u></p> <ul style="list-style-type: none"> <li>• Forming an ongoing Best Jokes/Potluck Dinner Group</li> <li>• Creating Family Newspaper with Children/Grandchildren</li> <li>• Hosting an ongoing Book or Game Club at your Home</li> </ul>	<p><u><i>INDIVIDUAL/LOW MOBILITY</i></u></p> <ul style="list-style-type: none"> <li>• Creating the <i>Secret Recipes</i> Family Cookbook</li> <li>• Creating Family Tree with Dynamic Commentary</li> <li>• Creating <i>Ultimate E-Mail Letters</i> to Grandchildren</li> </ul>
<p><b>Enhancing <i>Individual Mastery &amp; Interpersonal Growth</i> Balancing <i>Brief with Enduring Relationships</i></b></p>		

While we are advised to plan for economic security for our future—to strive for a balanced financial portfolio—too little attention is paid to our developing a balanced “social portfolio” based on sound activities and interpersonal relationships that we can carry into and throughout later life.

The financial portfolio has 3 major concepts that influence its growth and development: (1) Assets to draw upon, with emphasis on diversification; (2) Insurance back-up should disability or related loss occur; (3) The idea that you start early and build over time, though it is never too late. The *social portfolio* is designed with the the same 3 major concepts in mind. (1) Your assets are the diversified interests and relationships that you can develop and draw upon; (2) The insurance back-up is addressed by focusing on two dichotomies—(a) individual vs. group activities and (b) high energy/high mobility vs. low energy/low mobility activities (The concept here is that should loss occur in the form of a decline in physical health, not all the interests you have developed require high energy or high mobility; similarly, if loss of spouse or a friend occurs, in the transition of dealing with such loss you have interests that you can draw upon that do not require the involvement of another.); (3) The idea that you start early and build is the third concept (thus, if you have an interest in writing, start by taking a course on creative writing, and in retirement, when you have the time, write the great American novel). At the same time, it is never too late to start or revise one’s social portfolio.

The diagram above of a sample social portfolio in preparation for later life reflects efforts to plan for the future, balancing *individual* with *group* activities, and balancing *high mobility/energy* endeavors (activities that require significant physical exertion) with *low mobility/energy* ones (those that require little physical exertion). Four categories of equal importance are thereby created: *Group/High Mobility*, *Group/Low Mobility*, *Individual/High Mobility*, and *Individual/Low Mobility*. At the same time, the goals of the social portfolio are to enhance individual mastery and interpersonal growth, while balancing brief with enduring relationships. The social portfolio is a way of helping people develop new strengths and satisfactions while aging—even in the face of loss.