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Identity Incongruence and Negotiation in the Transition from Work to Retirement: A Theoretical Model

Ariane Froidevaux
University of Florida

Andreas Hirschi
University of Bern

Mo Wang
University of Florida

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Corresponding author. Correspondence concerning this article should be addressed to Dr. Ariane Froidevaux, Department of Management, Warrington College of Business, University of Florida, P.O. Box 117165, Gainesville, FL 32611-7165, USA.

ariane.froidevaux@warrington.ufl.edu

Abstract

In an aging society, dealing with the disengagement from the work-related identity and the quality of retirement adjustment become major concerns for individuals and organizations. However, the processes through which retirement adjustment can be achieved and upon which conditions this depends are only partially understood, especially regarding identity transition processes. To address this issue, we suggest that identity incongruence, identity transition negotiation, and the variety of high-quality exchange relationships represent key factors that explain the different experiences in retirement adjustment quality. Integrating social identity, self-categorization, identity negotiation, and interpersonal perspectives, we develop a theoretical model with 12 propositions highlighting the dynamic changes in identity incongruence across time and the possible co-existence of the work-related identity and the retiree-identity. We also discuss the potential boundary conditions of the model, outline directions for future research, and suggest practical implications at the individual and organizational levels.

Keywords: transition from work to retirement, identity incongruence, identity negotiation, older workers, interpersonal relationships, retirement adjustment

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> Retirement is a moment of great change in one’s life. Professional life ends, but it is not life that ends. We have a tremendous opportunity, that is, to choose the person we would like to be, to continue with the best in us. (Female worker, 62 years old)

The aging of the Western population and the integration of seniors into society and work has been considered one of the major challenges of the 21st century (Shultz & Adams, 2007). With increasing longevity, the life expectancy at age 65 has also greatly improved across OECD countries (OECD, 2018). Consequently, retirement is no longer considered “a privilege for the few, but a normative 'third age' of the life course” (Robinson, Demetre, & Corney, 2011, p. 239) and represents an important life development stage for older workers. As work fulfills many explicit and implicit functions–such as extrinsic (e.g., income), intrinsic (e.g., autonomy, challenge, purpose), and social (e.g., status) rewards (Hall & Mirvis, 2013), exiting the workplace to retire may represent an important challenge for older workers.

Previous research has posited retirement as a stressful life event that is likely to affect well-being. Such studies generally focus on retirement adjustment, defined as the process through which retirees adapt to the changes in various areas of life and achieve contentment in retirement (van Solinge, 2013). Well-being, among other outcomes of the retirement adjustment process, has been considered as representing retirement adjustment quality (Wang, Henkens, & van Solinge, 2011). On the one hand, retirement may diminish well-being by reducing social contacts related to work (Horner, 2014), having reduced income, a greater likelihood of health problems, and less structured activities (Luhmann, Hofmann, Eid, & Lucas, 2012). On the other hand, retirement may enhance well-being by reducing work-related stress (Luhmann et al., 2012) and increasing the time available for non-professional activities and for family and friends (Horner, 2014). Extent reviews have reported inconsistent findings concerning the impact of retirement on psychosocial well-being, finding a positive, negative, or no impact, in both cross-sectional and longitudinal studies (for details, see Wang et al., 2011). This heterogeneity suggests the existence of different pathways of retirement adjustment.

Building on the work from Wang and Shi (2014), we define retirement as an individual's exit from the workforce at the end of one's career, which accompanies decreased psychological commitment to and behavioral withdrawal from work. This definition implies that individuals need to position themselves with respect to the exit event (i.e., "Who am I in light of this retirement?") and the post-exit world (i.e., "Who am I now that I am retired?") (Conroy, Franklin, & O'Leary-Kelly, 2014). In particular, the need to socially and psychologically detach from work has been viewed as playing a key role in achieving successful retirement adjustment (van Solinge & Henkens, 2008). Previous theoretical models have highlighted that continuity or change in identity, related to the partial or total loss of the worker role, both manifest in the retirement process and may have an either neutral/positive or negative effect on psychosocial well-being. Identity crisis in retirement has been supported for instance by qualitative research describing retirement as radically disrupting one's life and requiring major changes (Nuttman-Shwartz, 2004). In contrast, identity continuity has been supported by research highlighting the importance of lingering work-related identity for self-definition after retirement (Damman & Henkens, 2017; Reitzes & Mutran, 2006; Teuscher, 2010). Indeed, according to continuity theory (Atchley, 1999), entering retirement would have a negligible impact on individuals' identity, because attitudes and actions in specific roles are predicted to remain relatively stable. Finally, previous work suggests that identity crisis and continuity may eventually depend on different factors such as work centrality (Barnes & Parry, 2004), and the degree to which individuals perceive their new roles in the transition as conforming to their actual self-images and personal goals (role theory; George, 1993).

However, several important gaps in the previous literature can be identified. First, the dynamic processes resulting in identity continuity or crisis remain ambiguous. Specifically, it is unclear whether identity crisis and continuity should be considered as the consequence of the retirement adjustment process (Conroy et al., 2014), as the process that leads to successful retirement adjustment quality (Atchley, 1999; George, 1993; van Solinge & Henkens, 2008)–or both. Further, while previous conceptual frameworks tend to emphasize identity crisis and continuity as an either-or dichotomy, less is known about the processes through which both identity crisis and continuity may occur at different periods of the transition. Notably, how individuals may feel in between the two statuses (Ibarra, 2005) of being a worker and being a retiree, and how successful retirement adjustment may not necessarily mean the loss of the work-related identity, remain open questions. Finally, more classical models from social and industrial-organizational psychology (e.g., social identity and identity negotiation theories) have rarely been integrated into the retirement literature. Previous work has framed identity in terms of role-based activities related to what people concretely do in their various roles, such as student, spouse and worker (e.g., self-in-role transitions and role theory; Ashforth, 2001; George, 1993). In contrast, little is known about social identities enacted by retirees (i.e., when meanings and expectations associated with individuals' affiliations to the groups of workers and/or the group of retirees are internalized)–beyond the confirmation of the existence of a social identity of retiree (Michinov, Fouquereau, & Fernandez, 2008) and the proposition that social identity should influence retirement adjustment (Hesketh, Griffin, Dawis, & Bayl-Smith, 2015).

Second, little is known about the very beginning of the adjustment process, defined as the *transition* period intervening after having entered retirement. Indeed, most previous studies have investigated the retirement adjustment process across years, as it is especially the case for nationally representative panel data (for instance, the U.S. HRS and the European SHARE panels collect data every two years), and qualitative studies have generally used retrospective designs. However, there is some indication that exploring what happens at the very beginning of the transition can be especially meaningful, because transitioning to retirement may be more unpredictable and complex than expected (Jonsson, Josephsson, & Kielhofner, 2001). Furthermore, additional knowledge on the transition period is necessary because what happens at that time is likely to play a crucial role in understanding retirement adjustment afterwards.

Third, while interaction partners have been recognized to play a central role in identity negotiation–as individuals "want to be known [by others] for who they believe they are" (Polzer, Milton, & Swann Jr, 2002, p. 299), the retirement literature has typically considered relationships related to spousal and children's influences (e.g., marital status, spouse working status; Wang et al., 2011) as one set of antecedents of retirement adjustment among others (van Solinge, 2013). Indeed, besides the recognition of the influence of role models and anticipatory socialization on identity continuity or crisis at retirement (Conroy et al., 2014), the influence of interpersonal relationships on identity in the transition from work to retirement has largely been overlooked. Moreover, while at the conceptual level, interpersonal relationships have been framed as a specific social resource within the resource-based dynamic perspective of retirement (Wang et al., 2011), there is currently a lack of literature conceptualizing the different dimensions of relationships, as well as how such dimensions may play a central role in retirement adjustment.

To address these gaps, in this paper we introduce a theoretical model that addresses the identity incongruence and related identity negotiation people experience when transitioning from work to retirement. This model focuses on the potential identity challenges at the beginning of the transition that may impede retirement adjustment quality, considering the key influence of interaction partners (see Figure 1). The proposed model contributes to the literature in three ways. First, our model is dynamic and distinguishes between the state of identity incongruence and the process of identity transition negotiation. In doing so, we offer a theoretical description of how older workers disengage from the work-related identity, while exploring a retiree-identity at the same time, with the aim to approach a compatible constellation of work-related identity and retiree-identity. As such, identity incongruence is conceptualized as a variable that can change across time in a dynamic manner. Based on an initial level of identity incongruence, we argue that certain individuals may need to engage in identity negotiation more intensively than others; and that identity transition negotiation represents the process through which older adults can reduce their perceived identity incongruence over time. Further, our theoretical model integrates insights from broader social and industrial-organizational psychology theories such as identity negotiation (Swann, 1987), social identity (Tajfel, 1978), and social categorization (Turner, Hogg, Oakes, Reicher, & Wetherell, 1987) theories to retirement adjustment theories (i.e., continuity and role theories).

Second and relatedly, we offer an explanation of the dynamic processes that underlie the work-to-retirement transition, a period where individuals are "in-between" two statuses (Ibarra, 2005). Specifically, we explain how successful retirement adjustment may not necessarily mean the loss of the work-related identity–but rather, its coexistence with the retiree-identity. We propose that the result of the identity negotiation process implies a reflection upon the possibility and conditions of adopting a retiree-identity that is compatible with the work-related identity; which, in turn, impacts retirement adjustment quality. As illustrated by the differentiation and stereotyping strategies, self-identification may imply a greater accent on either the work-related identity and/or the retiree-related identity. Such co-existence may not necessarily reduce retirement adjustment quality, as long as one of these identities does not hold a clearly inferior value or stigma–which would compromise their compatibility. In doing so, we explain how the transition period plays a crucial role in understanding later retirement adjustment.

Third, we concretely expand the meaning of social resources for retirement by focusing on the variety of high-quality interpersonal relationships, which provides an emphasis not only on interpersonal relationship quality but also on the diversity of their sources and the types of social support exchanged. Further, we develop the central and dynamic role of relationships in the work-to-retirement transition by relying on three main notions from identity negotiation theory (Swann, 1987). First, entering retirement implies that one's community and interacting partners are likely to recognize a significant change in the individual, and as such, modify the way they treat him or her. Second, as a result, newly retirees may eventually become less engaged in their initial work-related identity and gradually increase their investment in the retiree-identity, in congruence with the treatment they receive from others (Swann & Bosson, 2008). Third, as new retirees enter the process of identity negotiation and specify their individual constellation of work-related identity and retiree-identity, they need to integrate feedback from their interacting partners that is supportive–or not–of their new self-views. As such, we move forward the previous literature describing the role of social resources as one predictor of retirement adjustment among others, by explaining how the variety of high-quality interpersonal relationships represents a key predictor and outcome not only of retirement adjustment but also of identity incongruence in the transition from work to retirement.

Insert Figure 1 about here

Identity Incongruence in the Transition from Work to Retirement

In this paper, we highlight the psychological processes that underlie the work-to-retirement transition by emphasizing the importance of social identities in understanding the process through which individuals may transition from a work-related identity to a retiree-identity as they enter retirement. Specifically, we adopt a functionalist approach (Corlett, McInnes, Coupland, & Sheep, 2017) that emphasizes social identities as relatively stable social cognitive constructs at the individual level (Atewologun, Kutzer, Doldor, Anderson, &

Sealy, 2017; Brown, 2015). We rely on social identity (Tajfel, 1978) and self-categorization (Turner et al., 1987) theories, which highlight the internalization made by individuals of social categories that are shared, to a lesser or greater extent, with those who perceive themselves as members of the same group (Haslam, Cornelissen, & Werner, 2017). Social identity theory highlights the impact of group membership and social norms, values, and goals, attached to these groups in the formation of identity. Similarly, categorization refers to the process of including individuals, hence oneself, into perceived relevant social categories, out of all existing possibilities.

In this paper, we focus on the two core social identities challenged in the context of the transition from work to retirement, namely work-related identity and retiree-identity. *Work-related identity* refers to the "aspects of identity and self-definition that are tied to [...] a membership in work-related groups, organizations, occupations or professions" (Dutton, Roberts, & Bednar, 2010, p. 266). We hence use work-related identity as a general term, covering several identification foci (e.g., manager, leader, follower, team, organization, occupation-specific, career; Atewologun et al., 2017). Similarly, *retiree-identity* encompasses the aspects of self-definition that are related to a membership in the retirees' group (Carton & Cummings, 2013).

According to social identity (Tajfel, 1978) and self-categorization (Turner et al., 1987) theories, self-definition in terms of categorization with a specific group is always subject to revision, in response to social interactions and to specific events such as retirement (Brown, 2017). Indeed, following the reasoning by Branscombe, Ellemers, Spears, and Doosje (1999), transitioning to retirement is likely to emphasize perceptions of an incongruence between the work-related identity (i.e., older adults' may not be accepted anymore as members of the group of workers) and an increasingly salient retiree-identity (i.e., being now categorized as a retiree). Accordingly, new retirees may become less involved in maintaining their work-related identity and more involved in developing their retiree-identity, thus being more willing to bring their identities in congruence with how they are being seen by the community (Swann & Bosson, 2008).

To capture these aspects, we therefore focus on the *identity incongruence*, that is, an incompatible constellation of work-related identity and retiree-identity during the work-to-retirement transition (as illustrated in Figure 1). Put differently, we argue that as individuals transition from work to retirement, they have to deal with the salience of both the work-related identity and the retiree-identity, which may not necessarily be congruent with each other–that is, being “not harmonious” and “incompatible” (Merriam Webster Dictionary, 2018). Such tensions are likely to influence later retirement adjustment quality, as retirees may feel uncomfortable with the coexistence of both social identities during the transition period–depending on the result of using different identity negotiation strategies.

Antecedents of Identity Incongruence

Previous reviews have identified several general categories of antecedents of the retirement process (Wang & Shultz, 2010), and of retirement adjustment in particular (Wang et al., 2011). To take into account this complexity, such push and pull factors have been formalized into the multilevel perspective on retirement (Szinovacz, 2013), which states that the retirement process occurs at the interplay between micro- (i.e., individual), meso- (e.g., job, organizational, family), and macro- (i.e., societal) level factors. Accordingly, in this paper we develop four categories of factors directly influencing identity incongruence (see Figure 1): individual factors (i.e., micro-level); job- related, retirement-related, and organizational factors (i.e., meso-level); and socio-economic factors (i.e., macro-level). While several variables have been identified in the previous literature in each category (Wang et al., 2011; Wang & Shultz, 2010), we do not exhaustively elaborate on each of them, which would be beyond the scope of this paper. Rather, we illustrate how selected variables in each of the four categories that we consider as important examples can impact identity incongruence.

Individual factors. On the individual level, individuals with older chronological age and subjective age (i.e., how do I look, feel, behave, and what my interests are; Schwall, 2012) may experience less incongruence between their work-related identity and retiree-identity. This is because older chronological and subjective ages are consistent with the characteristics generally associated with the retirees' group, which may, in turn, improve the compatibility of the retiree-identity with the work-related identity. Indeed, many OECD countries still have laws defining an official retirement age that allows an individual to receive a pension (Phillips & Siu, 2012). Even absent such a law, age is often associated with normatively appropriate career transitions: According to the latest report by the Transamerica center for retirement studies (2017), the median answer to the question "at what age do you consider a person to be "too old" to work was 75 years old.

Second, we propose that older adults with more mental and physical health problems may experience less incongruence between their work-related identity and retiree-identity, because these may reduce older adults' capability to effectively perform and/or continue a life structured by further workforce participation (Wang & Shultz, 2010)–especially regarding physically demanding tasks. Thus, experiencing health issues is likely to ease the compatibility of the retiree-identity with the work-related identity because physical work ability is reduced.

Third, we suggest older adults with shorter time perspective may experience less incongruence between their work-related identity and retiree-identity. This is because perceived shorter remaining time in life is congruent with the characteristics generally associated with the retirees' group (i.e., a life stage occurring later in life, focusing on enjoying time left), which may, in turn, ease the compatibility of the retiree-identity with the work-related identity. This is in line with previous findings from Griffin, Hesketh, and Loh (2012), who reported that longer subjective life expectancy was related to higher intended retirement age, decreased retirement planning, and higher effective bridge employment rate one year later. Similarly, older workers with a shorter future time perspective were found to be less motivated to continue to work (Kooij, 2010).

Proposition 1: Individual factors such as (a) chronological age and subjective age, (b) mental and physical health, and (c) shorter future time perspective reduce identity incongruence.

Job- and retirement- related factors. On the job and retirement level, we assume that individuals who assigned greater importance to working before retirement may experience higher incongruence between their work-related identity and retiree-identity. This is because higher work-role centrality may lead older workers to devote more time to work and thus to be involved in fewer activities outside their job. They may hence lack possible alternative role identities (e.g., grand-parent or related to leisure activities) associated with the retiree-identity (Barnes & Parry, 2004); thus diminishing its compatibility with the work-related identity. Indeed, retirees whose work served as a central source of purpose and meaning in their lives were reported to be more likely to experience identity crisis as they disengaged from work (Sargent, Bataille, Vough, & Lee, 2011). Similarly, Teuscher (2010) found that missing one's job was negatively associated with the importance of the retirement status for self-definition.

Second, we suggest that retirement planning and/or counseling at any given point of the retirement process may be negatively associated with identity incongruence. Put differently, individuals who have sought information about retirement (e.g., financial or interpersonal planning) may experience less incongruence between their work-related identity and retiree-identity. This is because retirement planning allows older workers not only to project themselves in the retiree-identity (Dennis & Fike, 2012), by reflecting upon questions such as "who I am and what does this suggest for the person I will be?" (Swann, 1987, p. 1043); but also to reflect upon its compatibility with the work-related identity. In particular, as highlighted by Conroy et al. (2014), retirement planning/counseling may allow retirees in the transition process to more precisely define who they could be as retirees (i.e., forming their own retiree-identity) along their work-related identity, by facilitating the exploration of possible non-work identities that may constitute important aspects of their retiree-identity. This is supported by research on anticipatory socialization related to beginning to prepare one's future socialization in retirement while remaining an older worker, which was argued to constitute a buffering factor in the relation between work-related identity loss and successful adjustment (Conroy et al., 2014).

Third, we suggest that individuals with favorable attitudes toward retirement (e.g., expecting to enjoy it) may experience less incongruence between their work-related identity and retiree-identity. This is because these individuals would view adopting the retiree-identity to be desirable (e.g., having more time for leisure and family; Newman, Jeon, & Hulin, 2013); thus increasing its compatibility with the work-related identity. Indeed, Teuscher (2010) reported that positive attitudes toward aging (i.e., self-confidence toward old age) were positively associated with the importance of the retirement status for self-definition.

Proposition 2: Job-related factors such as (a) work-role centrality strengthens identity incongruence; and retirement-related factors such as (b) retirement planning/counseling, and (c) positive retirement attitudes, reduce identity incongruence.

Organizational factors. On the organizational level, we suggest that the involuntariness of the transition to retirement may be positively associated with identity incongruence. Involuntariness may be caused by organizational constraints such as a lack of flexibility regarding part-time work arrangements, with the consequence that individuals will lack control over their decision to retire. Indeed, while as aforementioned retirement planning may allow older workers to project themselves in the social identity of retiree (Dennis & Fike, 2012), the opposite reasoning is likely to apply to those who are forced to retire. As argued by Conroy et al. (2014), such older workers often could either not anticipate their social identity change in terms of a greater salience of the retiree-identity, or develop anticipatory sensemaking strategies about the disengagement from work; thus reinforcing the incongruence between the two identities in terms of a lack of compatibility.

As another example on the organizational level, we propose that individuals taking part in human resource management (HRM) practices such as formal succession programs may experience less incongruence between their work-related identity and retiree-identity. Concretely, such programs can mean that an older worker who is going to retire in the near future is given the opportunity to train and transfer his or her knowledge to his or her successor. Such an opportunity is likely to decrease identity incongruence because it not only allows individuals to project themselves in the social identity of retiree (Dennis & Fike, 2012) but also provides them with continuity in their work-related identity as passing on knowledge allows the recognition of its importance in the eyes of others (Conroy et al., 2014). Thus, participating in a HRM formal succession program is likely to increase the compatibility between the work-related identity and the retiree-identity.

Proposition 3: Organizational factors such as (a) involuntariness of the transition is strengthens identity incongruence; and (b) HRM formal succession programs reduce identity incongruence.

Socio-economic factors. In terms of socio-economic factors, we suggest that the social desirability of the work status may be positively associated with identity incongruence. Specifically, older workers living in cultures where a strong positive value is placed on work (e.g., as a signal of achievement; Halloran, 1985) may experience higher incongruence between their work-related identity and retiree-identity. This is because disengaging from the work-related identity is expected to be harder when the work status is perceived as especially valuable; thus diminishing its compatibility with the retiree-identity. This is in line with self-categorization theory (Turner et al., 1987), according to which categorizations of the self as member of the retirees' group can also be made by others, and more broadly, by the society. In such contexts, older workers may be more likely to frame their disengagement from work as the loss of a desirable status, whose social importance would be harder to replace by activities in other life spheres.

Similarly, we also suggest that older workers living in cultures where it is expected that individuals work longer at older ages may experience higher incongruence between their work-related identity and retiree-identity. Countries' employment rates of individuals aged 55 to 64 years old may represent a concrete indicator of the working norm for this age group, which concretely ranges from Turkey (34.6%) to Iceland (83.7%) (OECD, 2017). Indeed, living in the countries favoring working longer may increase identity incongruence, because disengaging from work in such contexts may be associated with perceiving a threat toward the work-related identity, thus diminishing its compatibility with the new retiree-identity. In contrast, living in contexts in which working at older ages is the least developed may be associated with less identity incongruence, because it may be easier to adopt a retiree-identity along with a work-related identity when it is not, or less, socially expected that older adults remain in the workforce.

Proposition 4: Socio-economic factors such as (a) the desirability of the work status, and (b) social norms for working longer, strengthen identity incongruence.

Process: Identity Transition Negotiation

While identity incongruence is conceptualized as a state, we further aim to theoretically clarify the dynamic psychological processes occurring in the work-to-retirement transition. To do so, we focus on *identity transition negotiation*, which refers to the process through which individuals deal with the identity incongruence that takes place in-between the times when older workers exit work and fully adjust to retirement. This notion frames identity negotiation (Swann, 1987) in the context of *identity transition*, defined as "the process of questioning, and eventually disengaging from, an identity that is central to a person's sense of self, while at the same time exploring, and eventually adopting, one or more substitutes" (Ibarra, 2005, pp. 2-3). Thus, this identity transition negotiation process is likely to modify older workers' identity incongruence. While initially older workers may have perceived the work-related identity and the retiree-identity as incompatible, along the process of identity transition negotiation, older adults are likely to approach a more compatible constellation of work-related identity and retiree-identity.

Identity incongruence influences identity transition negotiation. We suggest that individuals experiencing higher incongruence between their work-related identity and retiree-identity may be likely to engage in a more intensive and/or longer identity transition negotiation process, because their retiree-identity is perceived as disrupting the continuity experienced in their self-concept across time (Atchley, 1999; Dutton, Dukerich, & Harquail, 1994), associated with the work-related identity. Concretely, a lack of self-consistency may be perceived between the retiree-identity and the work-related identity in terms of personal goals and self-image (George, 1993). According to Ethier and Deaux (1994), the self-consistency motive urges individuals to categorize themselves in a way that is the most meaningful (i.e., coherent) with regard to their novel context. Concretely, older adults perceiving higher identity incongruence are thus likely to engage in identity transition negotiation to satisfy their self-consistency motive and thus to approach a more compatible constellation of work-related identity and retiree-identity (e.g., by negotiating a "retired entrepreneur" identity to differentiate oneself from other retirees). This reasoning is further in line with the control theory model of work motivation (Klein, 1989). Applied to our context, identity congruence may represent a major goal of the transition from work to retirement (i.e., referent standard). As such, the perception of identity incongruence (i.e., sensor or feedback) indicates a gap between individuals' current state of incongruence and their goal of congruence (i.e., comparator). To reduce this gap, individuals are likely to be motivated to make effort by engaging into the identity transition negotiation process (i.e., effector or behavior).

By contrast, older adults experiencing less identity incongruence at the beginning of the transition may engage less in identity transition negotiation, because they do not perceive the retiree-identity as disrupting their self-consistency motive over time. Put differently, as their retiree-identity confirms their self-image (e.g., as someone entering a new life chapter) and personal goals (e.g., of spending more time with family), these individuals do not need to put a lot of time and effort in negotiating their identity during the work-to-retirement transition. Applying control theory (Klein, 1989), in this case the gap between older adults' current state and their goal of identity congruence (i.e., comparator) is not important enough to trigger a feedback that would indicate the necessity for them to engage in identity transition negotiation. In particular, transferring the reasoning of Ethier and Deaux (1994) to the retirement context, older adults perceiving less identity incongruence may consider that while adopting a retiree-identity somewhat challenges the value and meanings associated with their work-related identity, it would not question the proper existence of the work-related identity itself.

Proposition 5: Identity incongruence increases motivation to involve in identity transition negotiation.

Identity transition negotiation influences identity incongruence. We further suggest that undertaking the identity transition negotiation process allows individuals to reduce the possible incongruence between their work-related identity and retiree-identity. This is because identity transition negotiation allows individuals to operate changes in their self-views by reflecting upon the possibility and conditions of adopting a retiree-identity that is compatible with the work-related identity. Applying the work by Ormiston (2016) about group diversity to the work-to-retirement transition, older workers may concretely use different perception framing strategies to negotiate their membership to the retirees' group.

First, identity transition negotiation can consist of the use of *self-stereotyping strategies*, which provide older adults with the opportunity to define themselves as being highly similar to prototypical members of the retirees' group. For example, some individuals may choose to present themselves as volunteers (i.e., alongside the stereotypical view of full retirees having a lot of availability, notably to contribute to the greater good), travelers with a camping car (i.e., alongside the stereotypical view of fully retired who travel the world), or as golf players (i.e., alongside the stereotypical view of retirees playing golf).

Second, identity transition negotiation may also consist of *identity differentiation strategies* that allow older adults to feel distinct from other members of the retirees' group by adopting a more idiosyncratic identity. For instance, some individuals may define themselves in terms of an uncommon and intensive leisure activity that may replace the time previously used to work (e.g., a marathon runner); or in terms of a non-traditional family structure (e.g., a childfree retiree). As another example, others may decide to emphasize their previous work-related identity, such as presenting themselves as "retired entrepreneurs". Indeed, as the work-related identity may continue to linger in retirement (Reitzes & Mutran, 2006), older adults who wish to differentiate themselves from traditional (full) retirees may direct their behaviors toward learning additional skills so that they may join the group of bridge workers, which they may perceive as more desirable (Hesketh et al., 2015; Zhan & Wang, 2015). Thus, in this context, older adults may feel pride identifying and presenting themselves as retirees holding a bridge job–or bridge workers, based on the idea that unlike others, they will never really retire and remain active in the job market.

These various examples illustrate the diversity of potentially unique identity constellations between the work-related identity and the retiree-identity that may emerge from the identity transition negotiation process. In other words, along the process of the identity transition negotiation, individuals are likely to decrease their identity incongruence and approach a more compatible configuration of work-related identity and retiree-identity.

This implies that for some, congruence between the two identities will be the outcome of the identity negotiation process; while for others, incongruence may remain, despite having been (significantly) reduced. As highlighted in the feedback loops of our dynamic model, individuals may undertake a continuous process of identity transition negotiation (see below) over time.

Proposition 6: Identity transition negotiation reduces identity incongruence.

Outcome of Identity Incongruence: Retirement Adjustment Quality

Our model further aims to link identity issues with the later retirement adjustment quality, as suggested by Hesketh et al. (2015) within their Retirement Transition and Adjustment Framework. Expanding their work, we suggest that individuals experiencing less identity incongruence–that is, more compatibility between their work-related identity and retiree-identity, are more likely to successfully adjust to retirement because of three mechanisms. First, a more compatible constellation of work-related identity and retiree-identity may enhance retirement adjustment quality because the elaboration of goals related to retirement as a new life chapter is likely to be easier. Indeed, identity incongruence is likely to activate different and competitive goals that may generate conflict and thus result in indecision. Concretely, older adults experiencing higher identity incongruence may thus be less likely to successfully adjust to retirement because they may struggle to align their goals in retirement and to develop activities aiming at achieving a specific purpose. Indeed, in her qualitative research, Schlossberg (2003) emphasized that holding conflicting goals (e.g., plenty of general ideas), unattainable goals, or no goals, were related to experiencing difficulties in adjusting to retirement.

Second, a more compatible constellation of work-related identity and retiree-identity may enhance retirement adjustment quality because in these identity constellations, none of the two identities is perceived as having a better or inferior value than the other. Put differently, both identities are emphasized as coherent and contributing to individuals' lives in retirement–if in different proportions, with an equally positive value. This is in line with previous research reporting that, in order to experience positive outcomes (e.g., well-being and health) such as retirement adjustment quality, group memberships should provide individuals with a sense of meaning, purpose, and belonging (e.g., advancement; Jetten et al., 2017). In contrast, previous findings also revealed that if the ascribed categorization to a group is related to perceptions of stigma, failure, or low status, the identity transition experience can be perceived as less coherent or comprehensible for these individuals than for others (Talaifar & Swann Jr, 2018); thus leading to reduced retirement adjustment quality.

Third, a more compatible constellation of work-related identity and retiree-identity may increase retirement adjustment quality because it implies that older workers follow the general retirement process, gradually disengaging from work (Wang & Shi, 2014) and at the same time increasing their commitment to the retiree-identity (Swann & Bosson, 2008). In doing so, retirees mostly need to attend to one set of values and expectations associated with the retiree-identity–instead of struggling with two. As the resulting psychological tension and anxiety is reduced, individuals can devote more cognitive resources to developing their unique constellation integrating the retiree-identity to the work-related identity. In contrast, difficulties in adjustment may arise from perceiving a threat toward the work-related identity, which may potentially harm its positive value (Petriglieri, 2011). Such threat may be concretely translated into individuals missing their work (Teuscher, 2010) and thus engaging in a grieving process (Conroy et al., 2014). Accordingly, it may be more difficult for these older adults to devote significant attention to altering their daily routines, activities, and lifestyles to better match their retiree-identity.

Proposition 7: Identity incongruence reduces retirement adjustment quality.

Interpersonal Relationships in the Transition from Work to Retirement

Our model views interpersonal relationships not only as an essential component for a successful retirement adjustment but also as the necessary basis for reducing identity incongruence in the transition period. As suggested by identity negotiation theory (Swann, 1987), to modify their self-concept individuals need not only to undertake an important reorganization of the way they view themselves (intra-psychic) but also to receive feedback supporting the new self-views from their interacting partners (interpersonal). The social environment surrounding individuals indeed plays a critical role in understanding how individuals define themselves in a stable manner, because "targets want perceivers to see them as they see themselves" (Swann, 1987, p. 1038). Specifically, Swann and Bosson (2008) highlighted the experience of a disagreement between the appraisals of the self by oneself and others. Applied to the transition from work to retirement, first, individuals encounter others' appraisals of themselves (e.g., general social expectations) that are likely to emphasize the retiree-identity, given that individuals have transitioned into retirement and are thus more likely to be perceived as retirees by their community. Second, in contrast, individuals' self-views are likely to emphasize the work-related identity at the beginning of the transition. As reviewed by these authors, such disagreement between one's self-views and others' has been associated with increased negative emotions such as anxiety, and maladaptive physiological and psychological consequences such as cardiovascular issues and distress. In order to diminish such disagreement, third, individuals are likely to negotiate their individual constellation of work-related identity and retiree-identity by integrating feedback from their interacting partners on their new self-views. Thus, interacting partners represent a key predictor and outcome of identity incongruence because they provide evaluations of individuals' self-views (see Figure 1).

As individuals may be connected to certain persons, and not to others, such patterns of relationships offer them with a specific network made of interdependent social exchanges providing them with resources (Oh, Chung, & Labianca, 2004). Specifically, we propose that interpersonal relationships in the retirement context may be best described by the notion of *variety of high-quality exchange relationships*. First, our emphasis on the *variety* of social relationships implies that social resources can come from diverse sources. Instead of focusing mainly on children and spouses (for a review, see Matthews & Fisher, 2013), we include marital, family, friends, and community relationships. In particular, variety is conceived as an indicator of diversity among older adults' network, in terms of the "distribution of differences […] in kind or category, primarily of information, knowledge, or experience" (Harrison & Klein, 2007, p. 1200).

Second, the *quality* of existing relationships is important to consider because according to socio-emotional selectivity theory (Carstensen, Isaacowitz, & Charles, 1999), it becomes of greater importance later in life as the purpose of interpersonal relationships shifts from gaining resources to obtaining affective rewards from others. One commonly studied relationship that can offer high-quality is the marital relation. In the retirement transition context, marital quality has been suggested to include the dimensions of conflict and solidarity (Davey & Szinovacz, 2004) and has been defined as "spouse's global evaluation of the positive and negative dimensions of the marriage" (Rauer & Jensen, 2016, p. 157). Expanding this definition to various sources (e.g., marital, family, friends, and community), we define high-quality relationships as evaluating the dimensions of the relationship with a significantly higher proportion of positive ones, compared to the negative ones. Further, high-quality relationships are characterized by trust (Oh et al., 2004).

Third, a focus on *exchange* relationships emphasizes that retirees are receiving and providing social resources at the same time. Generally, social resources have been described as a meta construct consisting of various sub-dimensions or types: emotional, network, esteem, information, and tangible assistance (Cutrona & Russell, 1990). Implicit to this view is that these dimensions refer to received social resources. In contrast, our model adopts the view that the retirement transition is affected by mutual social interdependency (van Solinge, 2013). Therefore, we incorporate the exchange dimension of social relationships by including both social resources that are *received* from others, and the often-overlooked dimension of social resources that are *provided* to others. Prosocial behavior in retirement has been suggested to include providing benefits to post-retirement work-related context (e.g., generative behavior in bridge employment that promotes an intergenerational transfer of knowledge), family (e.g., child care), and community (e.g., volunteering) (Fasbender, Wang, & Zhan, 2016). Indeed, previous research has found that once retired, individuals provided more instrumental support to family and friends by being involved in volunteering and care work; whereas social relationships and support received from work colleagues decreased (van den Bogaard, Henkens, & Kalmijn, 2014). Similarly, confirming the notion of exchange, Damman and van Duijn (2017) found that retirees who provided help to their children experienced more support from their children when transitioning to retirement.

Interpersonal Relationships and Identity Incongruence

Identity incongruence influences variety of high-quality exchange relationships. We suggest that the more identity incongruence, the less variety of high-quality exchange relationships in return. Indeed, according to self-categorization theory, individuals who have internalized belonging to a similar social category are expected to interact with other members to reach some consensus and to cooperate to implement behaviors that concretely translate their shared values and goals (Haslam et al., 2017). Put differently, members of common groups are expected to engage in mutual social influence (Jetten et al., 2017). First, identity incongruence is expected to reduce relationships' variety because it may diminish the mental space available to develop not only new social activities but also new relationships. Indeed, previous research has proposed that individuals need to "remoor" (i.e., literally meaning to make fast (a boat) by attaching it by cable to the shore again; U.S. English Oxford Dictionary, 2018) their social identity to new social supports as they detach their work-related identity from its supports in the former work environment (Ethier & Deaux, 1994).

Second, we propose that the less identity incongruence, the more relationships' quality. Indeed, experiencing greater compatibility between the work-related identity and the retiree-identity may result in smoother daily interactions with others, because of the higher predictability and manageability of the relation–that is, better knowing how to behave in the interaction as individuals infer that older adults have adopted a compatible retiree-identity along their work-related identity (Polzer et al., 2002). Thus, lower identity incongruence may increase relationship quality through an affective regulatory function (Swann & Bosson, 2008): Concretely, interaction partners will not only feel more intimate and satisfied with their relationships but they are also more likely to attain common goals.

Third, we propose that the less identity incongruence, the more exchange of social support in relationships. Indeed, a greater compatibility between work-related identity and retiree-identity may help gaining social support in respect to these specific groups. This is in line with social identity theory (Tajfel, 1978), according to which, when individuals share a common social identity with others, they are more likely be willing to help and provide informational, instrumental, and emotional support these persons they perceived as being members of the same group (e.g., "among retirees"; Haslam & Ellemers, 2011). This was further supported by a study reporting that retirees engaged in more provided instrumental support to family and friends, compared with older adults who kept working (van den Bogaard et al., 2014). Therefore, individuals perceiving low identity incongruence may develop new commitments that can provide them with additional resources in terms of variety of accessed information, higher quality in terms of positive evaluations of these relationships' dimensions, and increased opportunities for social support exchange.

Proposition 8: Identity incongruence reduces the variety of high-quality exchange relationships.

Variety of high-quality exchange relationships influences identity incongruence. We suggest that the variety of high-quality exchange relationships may help older adults decrease identity incongruence. Such an impact is likely to exist because identity incongruence is "neither static nor objective but, instead, [is] constructed from the dynamic and subjective perceptions of interaction partners” (Polzer et al., 2002, p. 299). Thus, feedback from others is expected to provide assistance for older workers to verify their self-views regarding their constellation of work-related identity and retiree-identity. Supporting these ideas, Lemay and Ashmore (2004) reported that among students transitioning to college, the initial reflected categorization from interaction partners (e.g., as a partier or brain) predicted self-categorization changes over time in this major life transition.

Indeed, having access to a wider array of interpersonal relationships, which are of high quality, and allow an exchange of received and provided social support, is likely to diminish identity incongruence. First, various social relations can manifest as multiple viewpoints that may enrich older adults’ reflections about how to improve the compatibility between the work-related identity and the retiree-identity. Indeed, in line with the information diversity literature (e.g., Jehn, Northcraft, & Neale, 1999), greater variety of relational sources may provide additional available knowledge, which further fosters taking alternative perspectives. Similarly, a wider array of relevant information will help individuals generate novel ideas to solve problems with possibly more complex solutions (Polzer et al., 2002). Concretely, as a larger variety of high-quality exchange relationships implies having access to more diverse information on the self, it may help older workers to (re)discover their own strengths, competencies, and personal contributions that are most meaningful to the others around them in the retirement context (Roberts, 2007) and thus contribute to develop a more compatible constellation of work-related identity and retiree-identity.

Second, building on the recognition of these strengths, relationships characterized by higher quality may encourage retirees to experiment with new activities among different groups (i.e., developing new social identities), which is improved by greater trust (Oh et al., 2004). Indeed, benefitting from the diverse viewpoints of highly valued social relationships can provide the opportunity to share one’s thoughts and feelings regarding the retiree-identity and its compatibility with the work-related identity, especially if belonging to the group of retirees is perceived negatively. For instance, if one believes that "retirement means being useless", conversations with trusted other retirees in one's personal network who are very active, or forming new relationships with retirees who spend their retirement in a way that corresponds more to the values of the individual, may allow retirees with such negative views to adopt a broader vision on the retiree-identity and ways to increase its compatibility with the work-related identity.

Third, increased opportunities for social support exchange may further reduce identity incongruence because it enhances a sense of mattering regarding one's retiree-identity; thus increasing its compatibility with the work-related identity. Put differently, older adults will develop identity constellations characterized by being important to others who rely on them. Indeed, Froidevaux, Hirschi, and Wang (2016) reported that received social support was positively associated with mattering defined as retirees' interactional self-concept. Similarly, van den Bogaard et al. (2014) emphasized that relationships may not only stimulate the social integration of retirees but also represent "raisons d'être", potentially substituting self-worth derived from work. Finally, social support received from family members was shown to decrease anxiety due to work-related identity disengagement in retirement (Chiesa & Sarchielli, 2008). In sum, the variety of high-quality exchange relationships may contribute to reduce identity incongruence because receiving social validation from diverse valued others is likely to encourage greater fit between their self-view and others' appraisals of them.

Proposition 9: The variety of high quality exchange relationships reduces identity incongruence.

Interpersonal Relationships and Retirement Adjustment Quality

Our model moreover postulates that the variety of high-quality exchange relationships may directly influence retirement adjustment quality (see Figure 1). First, a greater variety of high-quality exchange relationships can be expected to be associated with a higher amount of available social resources, which should result in greater retirement adjustment. Indeed, applying the reasoning of Jehn et al. (1999), informational diversity may be particularly useful in achieving well-being in retirement because this life transition represents a complex challenge. Specifically, various relationships may lead to increased retirement adjustment because older adults will benefit from the viewpoint of people with different educational or cultural backgrounds, and personal experience. This is likely to foster learning, insight, and problem-solving (Jehn et al., 1999), and in turn, well-being in retirement. By contrast, less diverse relationships may be less useful for retirement adjustment because familiarity, similarity, and proximity in personal experience and background may limit the opportunities of learning and problem solving; thus impeding well-being in retirement.

Second, overall, literature reviews observed that a reliable social network contributes to retirement adjustment (Barnes & Parry, 2004); and that married retirees who experienced better marriage quality and had fewer number of dependent children were likely to experience better retirement adjustment quality (Matthews & Fisher, 2013; Wang & Shultz, 2010). It seems thus reasonable to expect that higher quality of other types of relationships (i.e., family, friends, and community) may have similar influence, especially because of the trusting dimension of high-quality relationships (Oh et al., 2004). As such, retirees may feel comfortable trying out different options for them to attain well-being in retirement.

Third, greater opportunities to exchange social support are likely to increase well-being in retirement because these allow individuals to benefit from a higher access to tangible and emotional resources (Leung & Earl, 2012; Wang et al., 2011). As such social resources accumulate, well-being increases; while loss in social resources is likely to lead to well-being decline. This is indeed supported by empirical evidence. Regarding received social support, Chen and Feeley (2014) reported that social support from spouse and children (but not from family and friends) directly improved the well-being of retirees. Moreover, received social support has been found to be a significant antecedent of retirement satisfaction (Taylor, Goldberg, Shore, & Lipka, 2008) and of life satisfaction in retirement (Froidevaux et al., 2016). Regarding provided social support, research demonstrated that volunteering and providing helped both improved retirees' quality of life for over two years (Potocnik & Sonnentag, 2013). In sum, independently of identity incongruence, interpersonal relationships seem to enhance retirement adjustment quality so that the higher the variety of high-quality exchange relationships, the higher degree of retirement adjustment quality.

Proposition 10: The variety of high quality exchange relationships improves retirement adjustment quality.

A Dynamic Model: Reciprocal Influences

The specific duration of the transition phase is difficult to predict because it is largely a subjective experience. For certain older workers who anticipate their retirement, the transition may begin a few years before entering retirement. By contrast, others may not devote significant time or energy to think or plan for this transition—either because they lack concern for the transition or because retirement occurs unexpectedly. Finally, others may wait to have effectively retired or even having been retired for some months until they begin to really experience the transition. Thus, identity transition constitutes a dynamic process and our model recognizes a gradual process of diminishing identity incongruence, which thus concerns both older workers approaching the transition, and retirees in the adjustment process. Given the gradual transition process, it is possible for older adults to draw on their personal experience in retirement as feedback to inform their identity incongruence. Indeed, it is important to recognize that retirement adjustment outcomes do not necessarily lag behind the work-to-retirement transition. In other words, as soon as an individual enters retirement, the process of adjustment in various areas of life starts (van Solinge, 2013). To address this possibility, we introduce two feedback loops from retirement adjustment quality to interpersonal relationships and to identity incongruence (see Figure 1).

Retirement Adjustment Quality Influences Interpersonal Relationships

Previous research has considered interpersonal relationships both as a predictor and outcome of the transition from work to retirement. Indeed, regarding the latter, retirement may enhance connectedness as competing demands from work decline (Cornwell, Schumm, & Laumann, 2008). We thus propose that higher levels of retirement adjustment quality can increase the variety of high-quality exchange relationships in return. First, higher retirement adjustment quality may foster the creation of a more diverse network. This is because well-adjusted retirees can be expected to experience increased degrees of energy and motivation to engage in interpersonal relationships; which may, in turn, increase their variety. By contrast, when retirees struggle to adjust to retirement, it might be difficult for them to devote more energy and to be motivated to develop interpersonal relationships. Further, when experiencing difficulties in adjusting to retirement, older adults may even find it harder to maintain their existing interpersonal relationships, thus decreasing the variety of the relationships that they have. Indeed, Crego, Alcover de la Hera, and Martinez-Inigo (2008) reported that retirement adjustment was positively associated with new network creation and time for social relations. In contrast, low adjustment quality was related to a reduced social network and restrictions for social contact and activities.

Second, higher retirement adjustment quality may enhance the quality of interpersonal relationships because feeling comfortable at retirement may provide individuals with the opportunity to refocus on interpersonal relationships to enjoy them for their own sake, instead of being framed by specific roles and obligations (Barnes & Parry, 2004). By contrast, feeling uncomfortable in retirement may prompt family conflict or divorce because of a feeling of invasion of one’s personal space (Crego et al., 2008).

Third, higher retirement adjustment quality may foster the exchange of social support. This is because an active lifestyle oriented toward solutions when facing difficulties in retirement is likely to improve individuals’ emotion management by proactively requiring social support from others (Crego et al., 2008). Further, feeling comfortable at retirement may provide individuals with the energy to provide more instrumental support to their children (e.g., house chores) or through volunteering (van den Bogaard et al., 2014). Taking together, we expect:

Proposition 11: Retirement adjustment quality improves the variety of high-quality exchange relationships.

Retirement Adjustment Quality Influences Identity Incongruence

We argue that high retirement adjustment quality is likely to represent a positive feedback that the unique constellation of work-related identity and retiree-identity is compatible and relevant. Thus, retirees with high retirement adjustment quality may perceive lower identity incongruence because, first, after a transition period of searching for (Schlossberg, 2003) and trying out different possibilities (e.g., testing volunteering in specific organizations in terms of time commitment), being engaged in interesting activities in retirement may ease the elaboration of meaningful goals based on experience in retirement life. Put differently, developing novel interests and experiencing new activities in retirement may inform older individuals about how their work-related identity and retiree-identity can become more compatible in terms of the unique ingredients needed for their coexistence.

Second, experiencing higher retirement adjustment quality may diminish identity incongruence because it may not only counterbalance the potentially initial inferior value of the retiree-identity in the eyes of older adults but also promote a more positive self-image (Dutton et al., 1994) of the retiree-identity, which may thus become more attractive, and more compatible with the work-related identity. Finally, as older individuals experience greater adjustment in retirement, the grief processes toward a central work-related identity may get attenuated. Consequently, more energy and attention can be devoted reflecting upon how the work-related identity and the retiree-identity may be more compatible. In sum, we expect that the higher retirement adjustment quality, the lower identity incongruence.

Proposition 12: Retirement adjustment quality reduces identity incongruence.

To conclude, it is possible that high identity incongruence may remain until the person is situated much later in the process of retirement adjustment, as people may experience various circles within the dimensions of the proposed model–therefore it is hypothesized as a dynamic process. For instance, the influence of the four categories of antecedent factors and interpersonal relationships on identity incongruence is expected to occur in a dynamic manner–that is, at any given point of the identity transition negotiation process. Indeed, at any time, as identity incongruence remains relatively high, older adults may turn again to identity transition negotiation and invest more time in this process. Further, depending on individuals, the impact of antecedents may occur either mainly once at any time of the process, at several times, or linger over it.

Discussion

Previous research has provided inconsistent findings regarding the impact of retirement on psychosocial well-being, suggesting diverse adjustment processes across individuals (Wang et al., 2011). Consequently, the question emerges what factors lead retirees to encounter difficulties in their retirement adjustment process. Our model provides a theoretical explanation of the reasons for such interpersonal differences by considering the key challenges related to identity incongruence and the primary importance of interpersonal relationships in shaping this experience. Concretely, we went above and beyond previous work in the retirement literature by describing the identity dynamics that occur during the transition from work to retirement and introducing identity incongruence, associated with the process of identity transition negotiation, as major issues to successfully adjust to retirement. As such our model expands the traditionally studied relations between micro-, meso-, and macro- level factors and retirement adjustment quality (Wang et al., 2011; Wang & Shultz, 2010).

In doing so, we also go beyond the dichotomy of an identity crisis/loss versus continuity (Conroy et al., 2014), and enrich role (George, 1993) and continuity (Atchley, 1999) theories in several ways. First, we provide new theorizing on how retirement adjustment is affected by individual experiences of identity incongruence, that is, an incompatible constellation of work-related identity and retiree-identity. Second, we consider and explain how successful retirement adjustment may not necessarily mean the loss of the work-related identity and conceptualize identity incongruence as a variable that can change across time in a dynamic manner. Third, to our knowledge, this paper represents the first attempt to conceptualize identity negotiation (Swann, 1987) in the context of the work-to-retirement transition. We further contribute to this theory by explaining how variety of high-quality exchange relationships shapes the identity-related transition as part of the retirement adjustment process. Specifically, we emphasize the benefits from having high proportion of positive social relationships, the importance of informational diversity embedded in those relationships, and the receiving as well as providing of social support in those relationships. In sum, we explain how high-quality exchange relationships relate to identity incongruence in a dynamic manner as a predictor and outcome.

Boundaries of the Current Model

Although our model explicitly includes socio-economic factors as important antecedents to identity incongruence, broader context-related influences might affect the processes described herein in more profound ways and thus act as boundary conditions of our theoretical model (Whetten, 1989). First, the existence of the modern form of “identity”, characterized by a preoccupation for individuals’ self-image, has been dated to the 1960s only (Knights & Clarke, 2017). As such, our model may be bounded by the evolution of the identity concept, mostly applying to the modern concept of identity (i.e., addressing the "why now" dimension of the model; Whetten, 1989).

Second, in line with previous theorizing on the transition to retirement, we focus on retirement adjustment quality as the outcome of interest. This outcome has been operationalized in previous research in terms of subjective well-being (e.g., life or retirement satisfaction, positive affect; Wang et al., 2011). However, certain cultures may not share this prominence accorded to personal well-being as the desired outcome of the retirement adjustment process. Indeed, Joshanloo and Weijers (2014) have recently highlighted that in certain cultures, happiness and well-being are not always highly valued. For instance, happiness pursuit was reported to be more strongly endorsed by American than Chinese participants, while Chinese were more likely to endorse a dialectical balance between happiness and unhappiness than American participants (Lu & Gilmour, 2006). As such, the propositions in our model regarding the relation between identity incongruence and retirement adjustment in terms of well-being may not be applicable to certain cultural contexts, in which well-being (e.g., life satisfaction) may not be the optimal indicator of adjustment. In such contexts, the culture-specific view about satisfaction with retirement may be a better indicator.

Third, regarding the variety of high-quality exchange relationships, as identity is constructed through interpersonal relationships (Ibarra & Barbulescu, 2010; Roberts, 2007), one can reasonably expect that identity incongruence might also depend on cultural contexts and their specific norms related for instance to reciprocity (i.e., receiving and providing support). Indeed, studies have reported that the positive impact of receiving social support on health was moderated by support-approving norms in the cultural context (Park et al., 2013). For example, a study using a Korean sample revealed that the intergenerational relationships of older adults depend on their living arrangements (i.e., living with their children enabled them to receive more social support), as well as on the norm of filial piety, especially from the eldest son (Kim, Hisata, Kai, & Lee, 2000). As such, the propositions in our model regarding the relation between identity incongruence and interpersonal relationships may not be applicable to certain cultural contexts, depending on their norms about variety, quality, and/or exchange of relationships.

Directions for Future Research

Research designs. Overall, to adequately consider the dynamic aspect of the model, it is necessary that future studies investigate its propositions using a longitudinal design. This would allow capturing changes in and relations between identity incongruence, variety of high-quality exchange relationships, and identity transition negotiation over time. Such longitudinal design would notably clarify the role of the antecedents, and of interpersonal relationships, as predicting the initial level of identity incongruence and its evolution.

In addition, qualitative research might be especially relevant to better understand how older adults construct, deconstruct, and reconstruct the work-related identity and retiree-identity over time; and may provide additional insights on how identity incongruence should be best measured. Notably, future qualitative research may further provide a deeper exploration of the meanings of identity incongruence, of the identity transition negotiation process, including what constitutes these states and processes and how individuals build a more compatible constellation of work-related identity and retiree-identity. Using designs such as semi-structured interviews, retirees might be able to explain in depth how the compatibility between these two identities increased for them over time, as well as describe the events and behavioral strategies that may have significantly influenced this compatibility (e.g., widowhood, ceasing bridge employment because of health problems).

Identity incongruence. Overall, more research is needed on the identity-related transition from work to retirement. Identity transition needs to be recognized as one of the major changes individuals need to adjust to during the retirement process (in addition to traditionally emphasized changes in daily life structure or in financial states). Specifically, our model suggests that being comfortable with one’s unique identity pattern (i.e., compatibility between the work-related identity and the retiree-identity), can contribute greatly to successful retirement adjustment. Future studies need to empirically measure identity incongruence and the process of identity transition negotiation. Indeed, little research has assessed different group identities enacted by older workers and retirees. The main existing questionnaire, to our knowledge, is the Retirees' Social Identity Questionnaire, which focuses exclusively on evaluating the retiree social identity, related to the previous worker identity (Michinov et al., 2008). This measure has eight items that capture the extent to which a person identifies him/herself as belonging to the retiree group. Example items are "the retirees' group is an important reflection of who I am" and "I would rather belong to the workers' category" (reversed coded). Using this measure, a score representing the strength of the retiree identity is obtained. The same eight items also exist to obtain a score representing the worker identity.

However, an important issue to consider is whether the concept of identity incongruence is better measured directly as a single construct (i.e., identity incongruence), or indirectly through the combination of two constructs (i.e., the differences or incompatibility between the retiree-identity and the work-related identity). This issue is similar to the discussion on the effectiveness of using atomistic and molar approaches in measuring person-environment fit (P-E fit). In particular, Edwards, Cable, Williamson, Lambert, and Shipp (2006) defined atomistic approach as measuring P-E fit by treating person and environment as separate entities and molar approach as directly measuring P-E fit as a single perception. These authors found that the correspondence between the measures of the atomistic and molar approaches were indeed very weak.

Finally, an interesting avenue for future research would be to explore how group members attempt to tailor outgroups' representations of themselves. Indeed, while the proposed theoretical model has focused on interpersonal and intrapersonal social identity processes, future research may focus on the intergroup context (e.g., meta-stereotypes, salience, collective behavior; Tajfel, 1978; Turner et al., 1987), exploring additional mechanisms at the intersection between intragroup and intergroup levels. Concretely, future work may focus on the use of group stereotyping (i.e., increasing perceptions of both ingroup and outgroup stereotypicality to increase one's distinctiveness with the outgroup; Ormiston, 2016) and strategies aiming at increasing the similarity between ingroup self-views and outgroups' appraisals of the ingroup (Swann, 1987).

Multiple social identities. In this article, we have focused on membership in both the group of workers and that of retirees. While developing mechanisms for all the various non-work social identities was beyond the scope of this paper, it certainly represents a fruitful avenue for future research to address the question of how individuals may experience incongruence between holding multiple identities. Social identities are multiple because they concern numerous group memberships—not only ascribed social categories such as gender or ethnicity but also everyday affiliations. Indeed, three non-work orientations have been summarized by previous literature (Hall, Kossek, Briscoe, Pichler, & Lee, 2013): family (e.g., friends, parents, siblings, children), community (e.g., informal labor, volunteering, non-profit board memberships) and personal life (i.e., a focus on time for the self to pursue personal interests such as hobbies and exercise). As these non-work orientations are likely to provide additional social identities, future research may investigate their compatibility in addition to that between the work-related identity and the retiree-identity; thus constituting alternative forms of identity incongruence. Notably, future research could expand the work of Teuscher (2010), who assessed the importance that retirees and older workers attach to different identity domains, including citizenship, age, occupation, and retirement as well as roles in various contexts (e.g., family, partnership, volunteer work). This author suggested the use of a measure of identity diversity in terms of the number of life domains retirees rated to be important to describe themselves. Notably, the relation between identity incongruence and identity diversity is certainly worth considering in future work. A last interesting avenue for future research would be to explore how the work-related and retiree social identities can fit into older adults' overall personal identity, conceived as a master identity made of the internalization of different traits, qualities, and abilities (Burke, 2004).

Interpersonal relationships. Little is known on the potential benefits of considering the variety of social resources, such as viewpoint diversity among the sources, regarding the identity transition into retirement. Further, it may be interesting to compare the benefits of having high quantity of relationships with the benefits of having low quantity but high quality relationships. In addition, the effects of receiving and providing social resources need to be further explored in the identity transition process, not only in terms of self-worth based mechanisms, but also in terms of resource accumulation through reciprocity building. Finally, additional efforts should be undertaken to develop adequate measures of the unified concept of the variety of high-quality exchange relationships. Concretely, the two-way social support scale (Shakespeare-Finch & Obst, 2011) may be particularly useful to measure the exchange of received and provided social support.

Practical Implications

A final contribution of our model is to suggest practical ways in which individual older workers, their families and friends, and Human Resource Management (HRM) professionals can have a favorable impact on the identity incongruence that older workers may experience when transitioning from work to retirement. Overall and according to our model, such implications are particularly important for older workers facing one or several of these conditions: when they are younger, in good health, with longer future time perspective; for workers whose work is central in their life, who do not benefit from retirement planning or counseling, who hold negative retirement attitudes; whose transition is involuntary, who cannot engage in formal succession programs; and who live in countries that highly value work and expect older workers to work longer–as these are suggested to enhance identity incongruence.

HRM professionals. HRM professionals can influence identity incongruence because they play a role at the meso-level of organizational factors. Concretely, our model suggests that they should encourage the development of formal succession programs and discourage organizational incentives leading to involuntary retirement. Regarding the age-based HRM strategies identified in the literature (van Dalen, Henkens, & Wang, 2015), first, for exit strategies aiming at offering an exit path through early retirement, our model highlights the importance of offering flexible ways of retirement (e.g., gradual and part-time retirement, bridge employment) to decrease identity incongruence in older workers. This is important because such ways allow becoming gradually accustomed to retirement life and exploring possible meanings and conditions for a retiree-identity to be compatible with the work-related identity; as well as investing in (new) high quality relationships. Such strategies are further beneficial for employers themselves, as employing retired workers clearly represents a substantial opportunity to promote effective knowledge management in organizations (Slagter, 2007).

Second, regarding HRM development strategies (van Dalen et al., 2015), our model highlights the importance of offering group or personal retirement counseling sessions for older workers to reduce identity incongruence by reflecting upon how to approach a more compatible constellation of work-related identity and retiree-identity. In particular, career counseling sessions may allow the exploration of the optimal match between retirees' values and specific plans in retirement–especially those that are not related to paid employment (Hesketh et al., 2015). Further, such interventions may provide additional interacting partners (i.e., greater variety), with whom to discuss the personal meaning and social norms attached to the idea of belonging to the retiree group and ways to increase its compatibility with the work-related identity. Finally, such a HRM strategy is further beneficial for employers, as it may improve their organizational attractiveness thanks to the demonstration of social responsibility towards older employees as part of their organizational culture.

Family and friends. Our model further suggests several concrete ways through which family and friends can help decrease older adults' identity incongruence. First, they can emphasize the (re)discovery of older adults' strengths and personal contributions that can be the most meaningful in the retirement context by encouraging them to experiment with new activities–regarding both non-work or bridge employment–allowing them to meet new people with overlapping interests who may confirm their self-views. Second, family and friends can discuss with older adults their respective perceptions of a membership to the group of retirees, to tend toward a greater compatibility with the work-related identity. Third, they may contribute to highlight and find continuity between older adults' retirement new life stage and their previous life stage as a worker. Fourth, they need not to be shy to ask for instrumental help from the retiree, or to suggest volunteering opportunities, as these may enhance a sense of mattering regarding the constellation between the work-related identity and the retiree-identity.

For older workers. Finally, our model of identity can inform older workers themselves of good practices that may improve their adjustment to retirement through reduced identity incongruence. As these reflections are definitively complex, individuals facing important difficulties are encouraged to go through these with the help of a career counselor. First, we suggest that older adults clarify their personal goals for their late career stage, to ease the choice of the most satisfactory path to retirement. Second, older workers need to take the time to think about whether the retiree-identity disrupts the continuity they experience in their self-concept over time, by reflecting about their identities in the past, present, and projected future (e.g., see the concrete exercise proposed by Froidevaux, 2018). Third, while engaging in identity transition negotiation, older workers need to reflect upon the conditions under which they may adopt a retiree-identity that is compatible with the work-related identity. Concretely, older adults may write down their thoughts about what it means to be an older worker and to be a retiree, respectively. Then, similarly as motivational balance exercises, looking at the two respective columns (workers and retirees), older adults may reflect upon the degree of compatibility they would favor between the work-related identity and the retiree-identity to elaborate their unique identity configuration between the work-related and the retiree-identity.

Conclusion

To conclude, as the aging population constitutes a worldwide concern—and given that each person will likely belong to the old age social category at some point, we believe that it is becoming increasingly necessary to conceive of and discover ways through which identity patterns between the work-related identity and the retiree-identity can be compatible and harmonious as individuals undertake the various paths to retirement (Cahill, Giandrea, & Quinn, 2015). It is our hope that our dynamic model of identity incongruence and interpersonal relationships will provide an impetus for the study of the retirement adjustment process in terms of identity incongruence and transition negotiation among scholars and will enrich the broader reflection in organizations regarding aging and retirement policies and processes.

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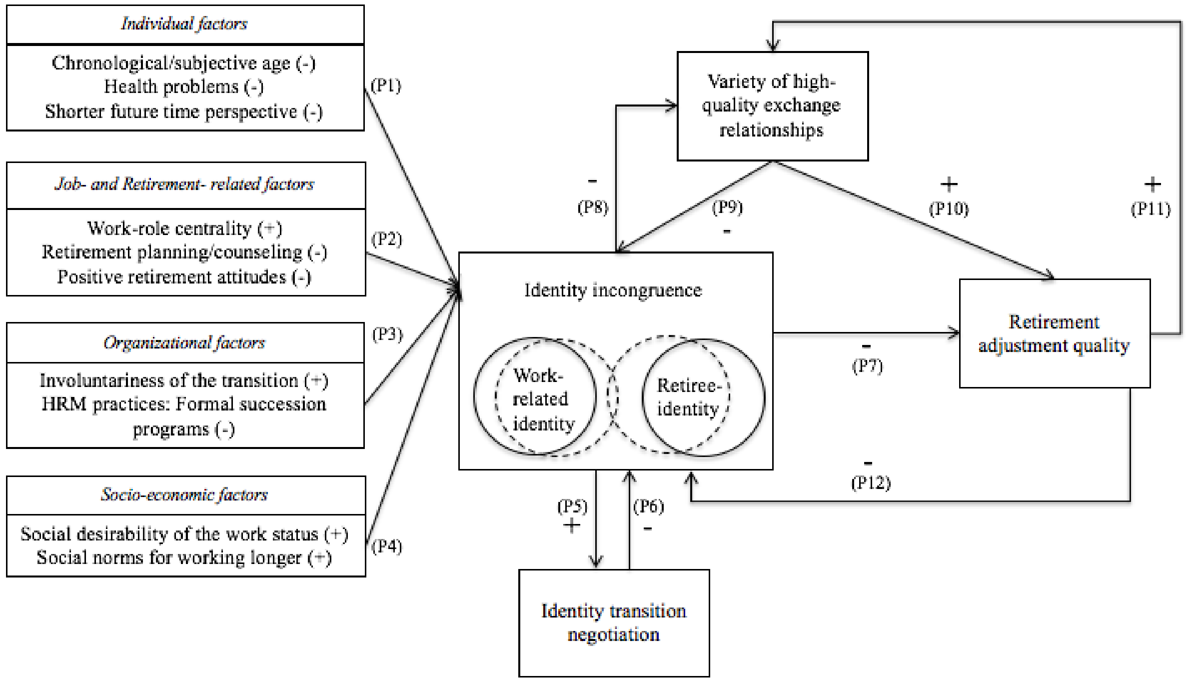

Figure 1. The theoretical model of identity incongruence in the transition from work to retirement. Dotted lines represent the dynamic evolution of identity incongruence toward greater compatibility between the work-related identity and the retiree-identity over time.