

Transcending Boundaries: The Spiritual and Psychological Transformation of Expatriate Retirees

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This study investigated the transpersonal effects of self-initiated expatriation among retirees, a phenomenon increasingly significant in today's globalised world. The research contextualised expatriation within a broader exploration of retirees' pursuit of a better quality of life, cultural enrichment, and personal growth, situating these motivations within the existing literature on ageing and transpersonal psychology. Employing organic inquiry, a method that captures deeply personal and transformative experiences, and looking into the experiences of four expatriate retirees, the study revealed four key themes: the initial call to expatriation, identity reformation through cultural immersion, the challenges of cultural integration, and the psychological rebirth characterised by gerotranscendence. Findings suggest that expatriation in retirement leads to profound psychological and spiritual transformations, fostering a redefined sense of self and an expanded worldview. These insights contribute to a deeper understanding of the psychological and spiritual dimensions of retirement and ageing, challenging traditional narratives and offering new perspectives for scholars, policymakers, and individuals considering expatriation. The study fills a critical gap in the literature by providing a nuanced exploration of the personal and transpersonal consequences of expatriation.

Keywords: transpersonal psychology, expatriation, retirement, spiritual growth, identity, cultural adaptation, gerotranscendence

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Retirees' decision to expatriate is increasingly understood not merely as a geographic transition but as a multifaceted journey that encompasses both spatial relocation and temporal exploration (Harlem, 2010). For many retirees, moving to a new country is linked with a quest to traverse their ancestral timeline, seeking a deeper understanding of their heritage and cultural identity (Mackey & Evans, 2021). This article delves into the profound transpersonal effects of self-initiated expatriation among retirees, exploring the deep psychological and spiritual transformations that accompany this life choice.

Drawing from concepts in cultural geography, transpersonal psychology, and historical consciousness, previous research has illustrated that expatriation can catalyse personal growth, self-discovery, and the redefinition of one's identity. Various studies have examined expatriation among retirees, focusing on motivations, coping strategies, and personal growth. For instance, motivations often include the pursuit of a better climate, enhanced social conditions, and a deeper sense of meaning and self-actualization (Goss, 2019; Harlem, 2010; Myklebost, 1989).

The concept of *gerotranscendence*, developed by Tornstam (2011), is particularly relevant to understanding the spiritual and psychological transformations that retirees experience. Gerotranscendence theory posits that ageing can lead to a shift from a materialistic and rational worldview to a more cosmic and transcendent one. This shift, characterized by a deeper existential awareness and a new perspective on life, is critical to the experience of expatriation. Recent research has further explored interventions to promote gerotranscendence, highlighting its significance in fostering spiritual growth in later life (Abreu et al., 2023).

Moreover, studies have underscored the importance of cultural adaptation and the creation of new social networks in the expatriation process. Retirees often develop heightened resilience and cognitive flexibility, which are crucial for integrating into new environments (Wang, 2007). These adaptations not only facilitate smoother transitions but also contribute significantly to retirees' psychospiritual growth.

This study builds on this body of literature by investigating the spiritual and psychological impacts of retirees' choice to live abroad in unfamiliar countries. Specifically, it seeks to answer the following research question: What are the spiritual and psychological impacts of retired people's choice to live abroad, in an unknown country, and how does self-initiated expatriation contribute to psychospiritual growth? By addressing this question, the study aims to provide valuable insights into how expatriation affects retirees' sense of self and their connection to the world, thereby contributing to a more comprehensive understanding of this phenomenon.

Method

Research Design

The study employed organic inquiry, a method that emphasises the personal and subjective experiences of the researcher and participants (Clements, 2011). Organic inquiry is described as an iterative and alchemical process, comprising three main stages: (a) inward examination

when the researcher introspectively examines her/his own experience and perspective related to the topic; (b) outward analysis that involves analysing other participants' experiences and relevant literature; (c) inward reflection when returning to reflect on the researcher's own shifts and changes in understanding the topic in light of the collected data (Clements, 2011). This approach is particularly suited for research that seeks to explore the subtleties and depth of personal and shared human experiences and values emotional resonance and personal transformation, treating research as a sacred, interactive process. It diverges from traditional objective methodologies by acknowledging and embracing the researcher's journey as an integral part of the research. In the context of studying retirees' expatriation, this approach allows for a deep, empathetic engagement with participants' stories, capturing the nuanced emotional and spiritual dimensions of their experiences.

Anderson (2011) outlined a five-cycle process for data collection and analysis. Since organic inquiry lacks a standardised procedure for these steps, this five-cycle process was adapted from the method of intuitive inquiry.

The first cycle involved the emergence of the research project topic, where the researcher identified a topic based on personal experiences, specifically examining the expatriation process in retirees. This stage involved deep introspection and personal reflection to uncover the research focus that resonated on a personal and transpersonal level.

The second cycle entailed an exploration of personal values, assumptions, and understandings regarding the topic, supplemented by a review of relevant literature. This stage involved daily self-reflection and regular shamanic journeys, which allowed the researcher to connect with deeper insights and perspectives on the expatriation experience.

The third cycle comprised the selection of participants and data collection, which involved interviewing participants, documenting their stories, and conducting in-depth analysis of articles and books. The researcher established strict criteria for selecting information to maintain focus, given the multifaceted nature of retirees' expatriation, encompassing transpersonal, social, political, and sociological aspects. The use of semi-structured interviews allowed participants to share their stories in a way that honoured their unique experiences and the sacred connection inherent in organic inquiry.

In the fourth cycle, reflection on changes and learnings, the focus was on how the researcher's understanding and perspective evolved from the initial views in Cycle Two. This cycle initiated the writing process, reflecting on the shifts in perspective based on the research findings. Reflective journaling and meditative practices were key components, ensuring that the researcher's personal transformation was integral to the analysis.

The fifth and final cycle involved integrating the new insights from cycle four with the empirical and theoretical literature reviewed in Cycle Two. This integration facilitated the development of the discussion section, where the sacred and transformative nature of the participants' stories was emphasised.

The research method included a collection of data on lived experiences, emotions, behaviours, and the meanings attached to them. Tools used included personal journaling, interviews, personal experimentation such as channelling or shamanic journeys, analysis of dreams, and intuitive listening. This approach allowed for the exploration of subconscious knowledge, combining intuition and scientific rigour. The researcher’s own experiences, including travel and family history, played a significant role in shaping the research direction. This comprehensive methodology, combining introspection, extensive qualitative data collection, and iterative analysis, provides a robust framework for exploring the complex experiences of retirees who choose expatriation. It emphasizes the depth of personal transformation and the intricate interplay between individual journeys and broader sociocultural dynamics.

Participants

Participants in the study were considered co-researchers, with knowledge emerging from a collaborative experience. This aspect is crucial in exploring retirees’ psychospiritual transformation through expatriation, as it touches upon a broader range of transpersonal human experiences. The study detailed individual narratives that illustrated these themes, providing rich, qualitative insights into the experiences of retirees who chose expatriation. These narratives underscored the complexities of their decisions, the cultural and emotional challenges they faced, and the profound transformations they underwent.

Participants were selected based on stringent inclusion and exclusion criteria, targeting retirees who relocated abroad for reasons other than economic necessity or political problems. Eligible participants had to be retired individuals who chose to move to an unfamiliar country upon retirement. They needed to be engaged in self-inquiry, inner work, or personal development, with the ability to clearly articulate their experiences. Additionally, participants were required to be fluent in English and to be capable of committing to the research process.

The study involved four participants in addition to the researcher. All of them decided to relocate to a country they had never been to before. Table 1 summarises the main details.

Table 1

Participant Information

Pseudonym	Age	Gender	Nationality	Host Country	Former Travel Worker?	Relationship Status
Katie	68	Female	US	Portugal	No	Single
John	70	Male	US	France	Yes	Single
Ingrid	62	Female	Canada	Portugal	Yes	Married
Amy	56	Female	US	France	Yes	Single

Data Collection

Semi-structured interviews were conducted online using video conferencing tools, which provided a flexible and accessible approach given the geographical diversity of participants. Each interview lasted approximately 60 to 90 minutes to allow for in-depth exploration of participants' experiences and was recorded with their consent.

The interviews focused on exploring participants' experiences of moving abroad, the impact of settling in an unknown country on their sense of self, the personal significance of the move, the challenges they faced, and their perceptions of how others view them both in their new country and their home country.

The semi-structured format of the interviews allowed for open-ended questions that encouraged participants to share their stories and insights in depth. This approach enabled the researcher to explore specific themes while also allowing participants the freedom to guide the conversation toward areas they found significant.

Data Analysis

The data analysis process was rigorous and systematic, involving several key steps to ensure that the sacred and transformative aspects of the participants' stories were honoured.

First, all interviews were transcribed using the software NVivo. The use of NVivo software for qualitative data analysis was instrumental in organizing and coding the data systematically. However, it is important to note that NVivo served as a tool for initial thematic organisation rather than the primary means of connecting with the sacred aspects of the data.

Interviews were then analysed, themes and patterns that emerged from the discussions were identified and aligned with literature findings and the researcher's insights. This initial coding process involved identifying significant phrases, sentences, and paragraphs relevant to the research questions and encapsulating the nuanced emotional and spiritual dimensions of the participants' experiences.

The initial codes were then reviewed and refined through a process of focused coding. This step involved grouping similar codes and identifying patterns and connections between different segments of the data. Focused coding helped in narrowing down the data to more specific themes.

The final step involved conducting a thematic analysis, where the identified themes were further analysed and interpreted in the context of the research questions and existing literature. This analysis provided deeper insights into the transpersonal effects of self-initiated expatriation among retirees, highlighting the key patterns and transformative processes experienced by the participants.

To ensure this deeper connection, the researcher undertook reflective journaling, meditative practices, and shamanic journeys, which facilitated a profound engagement with the

data at an intuitive and spiritual level. This holistic approach ensured that the analysis remained true to the principles of organic inquiry, honouring the sacred connection and transformative potential inherent in the research process.

Ethical Considerations

Ethical considerations were a fundamental aspect of this research. Ethical approval was obtained from the Alef Trust Research Ethics Panel, and all participants provided informed consent before their involvement in the study. Confidentiality was maintained by using pseudonyms for all participants and ensuring that any identifying information was removed from the data. Participants were informed of their right to withdraw from the study at any time without any negative consequences. Additionally, the research ensured that the interviews and data collection processes were conducted in a manner that was respectful and sensitive to the participants' experiences, minimising any potential distress or discomfort.

Results

From the discussions with the participants and personal observations, the following main themes emerged, unravelling the complexities and inspirations behind their decisions to expatriate, the challenges they face, and the profound internal transformations they undergo.

The Decision to Move Abroad: Answering the Call

Many participants embarked on this journey driven by long-held dreams. As Ingrid expressed, "I was always fascinated with Europe", while John's lifelong love for Europe began at age four: "I've been in love with Europe since I was 4 years old". This pursuit often reflected deep-seated desires to immerse themselves in culturally or historically rich environments or to live near the sea.

Another compelling factor was the desire to honour one's ancestry. The participants, rooted in North America's "new countries," carried transgenerational memories and beliefs about the positive impacts of expatriation. For instance, Ingrid's narrative of her German immigrant parents in Canada: "My parents were German immigrants to Canada", illustrates this point. This sense of historical continuity bestowed optimism and resilience, aiding their integration into new cultures.

Common personality traits among the participants included a penchant for adventure and risk-taking, a sense of being protected by an unseen force, and a deep-seated gratitude. Ingrid's acknowledgement of feeling fortunate: "I feel lucky. It's wonderful, you know, to just have all these new experiences", and the excitement of living in a new country: "It's very exciting living in a country where everything is new", reflect these traits. This adventurous spirit and resilience were pivotal in helping them navigate the challenges of expatriation and integrate into new cultural environments.

Identity Reformation through Cultural Immersion

Expatriation provided retirees with a unique opportunity to immerse themselves in new cultures, leading to profound identity reformation and the formation of new social bonds. In these new environments, expatriates found kinship with like-minded individuals, forming a new definition of “family.” This newfound sense of belonging significantly enhanced their well-being and provided a sense of freedom and belonging beyond traditional national borders. Ingrid’s reflections illustrate this: “I mean we were all expats. I mean I consider them my family in Europe”.

The journey led to increased self-awareness and authenticity. Katie’s narrative of self-discovery post-expatriation reflects a broader trend among the participants towards greater resilience, empathy, and a renewed sense of identity: “I saw it was really possible as a single person for me to move to Europe. I was always worried before. I have never been able to make a decision. And here I just decided”. This newfound self-awareness indicated deeper spiritual maturity. Participants exhibited greater acceptance, openness, and an intuitive understanding of life and relationships, highlighted by Katie’s reflections: “Your personality is demonstrated through your language”.

The retirees’ interactions with diverse cultures and the formation of new, multicultural circles contributed to breaking down previously held, rigid cultural identities. Ingrid’s reflections exemplify this process: “Everywhere all the countries. There was Australia, Czech Republic, England, Ireland, the U.S. I’m missing somebody. Who am I missing? I can’t think of who else. Yeah, so yeah, a real mix”. These experiences led to the development of a more flexible and expansive sense of self, where retirees could integrate various cultural elements into their identities, enriching their lives and perspectives.

Through cultural immersion, retirees underwent significant psychological and spiritual transformations. The experience fostered personal growth and the development of a more expansive sense of self, enabling them to form meaningful connections within their new communities. The reformation of identity through these interactions highlights the profound impact of expatriation on their lives, reshaping their understanding of self and the world around them.

Cultural Integration and Adaptation

The process of expatriation often placed retirees at a cultural crossroads, prompting them to navigate the complexities of integrating into new societies while maintaining ties to their native cultures. Despite their initial motivations, many retirees found themselves creating tight-knit multicultural circles of expatriate friends, forming unique “liminal spaces” where they could navigate their new lives. These liminal spaces allowed expatriates to blend aspects of both their home and host cultures, fostering a sense of belonging and community. Ingrid’s experience exemplifies this trend: “My close group of friends are about six or eight of us. We were all from somewhere else”.

In these liminal spaces, expatriates experienced a reformation of identity through cultural immersion. The integration into diverse cultural environments led to increased self-awareness and authenticity, as well as the formation of new social bonds. John's narrative of self-discovery reflects this broader trend: "The moves meant that I change my whole life and I feel I'm somebody".

The relationship with their native society was often ambivalent. While many retained national pride, they also expressed criticisms of their compatriots, and a firm resolve not to return. This dichotomy is captured in statements like Ingrid's reluctance to live in the U.S.: "I don't know why anybody wants to live in the U.S. anymore quite honestly", and Amy's avoidance of fellow Americans abroad: "I try to stay away from these people". These sentiments reflect a complex relationship with their native countries, characterized by a desire to distance themselves from aspects of their previous lives while embracing new cultural identities.

Gerotranscendence and Psychological Rebirth

A prominent theme in the experiences of expatriate retirees is a sense of psychological rebirth. This rebirth is often catalysed by the retirees' immersion into a new cultural and social environment, prompting a re-evaluation of previously held beliefs and values. Katie discussed how moving abroad allowed her to reinvent herself, finding new meaning and purpose in life, which aligns with the concept of gerotranscendence and the emergence of a more transcendent perspective on life: "Every time you move, you can reinvent yourself. I am 56 and my husband, 64, so a chance to reinvent yourself at the age of 56".

This rebirth was made possible by the dissolution of rigid ego structures which refers to the process of loosening the fixed, often defensive boundaries of the self, leading to a more fluid and expansive sense of identity. This phenomenon was evidenced in several ways through the participants' narratives. For instance, Ingrid mentioned: "I think I'd like to think that some of it is I came without any real preconceived notions. I came open to whatever I would find here and was accepting you know". This openness facilitated a deeper connection with their new environments and allowed them to integrate new cultural elements into their identities.

Amy expressed a sense of freedom and expansiveness, feeling that "the sky has no limit" in her new environment. This transcendence was characterized by heightened awareness and the dissolution of previously rigid identity roles: "I really had the sense of being of tremendous positivity and unity and everything was right in the world" (Katie) or "I was no longer X's ex-wife or Y and Z's mother or this or that" (Ingrid, quote edited for confidentiality). This expanded sense of self and interconnectedness with the world enabled retirees to navigate their new lives with greater ease and fulfilment.

The retirees' interactions with diverse cultures and their formation of new, multicultural circles contributed to breaking down previously held, rigid cultural identities.

Discussion

The results of this study illuminate the complex and layered experiences of retirees who engage in self-initiated expatriation, and these findings contribute to a deeper understanding of the retirement phase and challenge the stereotypes on ageing, death, and life. In an increasingly interconnected world, the phenomenon of self-initiated expatriation among retirees presents a blend of personal transformation, cultural integration, and psychological rebirth. These individuals, coming from diverse backgrounds, undertake a journey that extends beyond mere physical relocation, representing a significant transformation in their life narratives and identities, with implications for broader societal paradigms.

The Decision to Leave

The departure from their homeland marks the beginning of a journey that transcends geographical borders and cultural limitations. This journey is not just a physical relocation but an emotional and psychological voyage that redefines their sense of self and place in the world. The decision to live abroad represents the answer to a call to move abroad (Myklebost, 1989). Some participants had long-held dreams or wishes, often from childhood, that were geographically and culturally oriented. All of them had transgenerational memories and beliefs about the positive effects of expatriation, with significant motivation to honour their lineage and find their roots. They reclaimed their heritage as a way to improve self-knowledge. As Mackey and Evans (2021) propose, expatriated retirees have inherited from their ancestors' experience, possessing resources to meet the increased stressors and demands of overseas relocation due to their higher cross-cultural competency, adjustment, and security in risk-taking.

Shared Traits and Archetype Emergence

Although the participants did not know each other and their motivations to live abroad were various, the interviews revealed several shared personality traits, including (a) a desire to travel and risk-taking: The participants shared a common desire to travel and were more prone to taking risks compared to seeking security; (b) a feeling of protection and gratitude: Many expressed a sensation of being protected by an invisible force and were grateful for their experiences; and (c) an attraction to adventure: A strong attraction to adventure and new experiences was a recurring theme among participants. They also share curiosity and humility. These traits align with previous studies that have documented similar characteristics in expatriates (Harlem, 2010; Inkson et al., 1997).

These common traits could foreshadow the emergence of a new archetype, made up of the wise old man and the traveller, transnationalism, promoting multiculturalism and looking for novelty and freedom (Jung, 1971; Taheri & Jalaly, 2013).

Gerotranscendence and Psychological Rebirth

A prominent theme in the experiences of expatriate retirees is a sense of psychological rebirth (Kemp, 2010; Mao & Shen, 2015). This rebirth is often catalysed by the retirees' immersion

into a new cultural and social environment, prompting a re-evaluation of previously held beliefs and values.

In this context, retirees often undergo a process of self-discovery, unearthing aspects of their personality and capacities that were previously unexplored or unrecognized. This transformation can be both exhilarating and challenging, as it necessitates a departure from long-held self-conceptions and comfort zones (Pinto et al., 2011; Wang, 2007). The challenges and opportunities of expatriation often lead to a search for deeper meaning and a redefinition of life goals. The journey involves coping with loss, enhancing resilience, and re-evaluating personal beliefs, contributing to significant psychological growth within a climate of tension created by the proximity of death (Wilber, 1984). Exposure to diverse environments enhances cognitive flexibility and creativity, with many participants reporting a boost in artistic and creative inspiration.

Participants report experiencing a deepening of personal spirituality, often leading to a heightened sense of unity and interconnectedness. For many retirees, living abroad has facilitated a spiritual awakening or deepened their spiritual journey. This awakening is often related to the exposure to new beliefs, philosophical outlooks, and ways of life that challenge their previous spiritual understandings (Adler, 2020). The retirees' narratives frequently include reflections on the interconnectedness of life, a heightened sense of empathy and compassion, and a reinvigorated search for meaning and purpose.

Creating Liminal Worlds

The study findings highlight the critical role of community and social integration in the expatriation experience. Forming new relationships and integrating into local communities can be a source of joy and support for retirees, but it can also present challenges, particularly in navigating language barriers and cultural differences. The extent to which retirees engage with their host community significantly impacts their overall experience and the depth of their cultural understanding and integration. The findings highlight a double movement: the creation of liminal worlds with fluid borders in the host country and a distancing from the home country (Harlem, 2010).

Transcending Internal and External Bondages

The retirees' narratives reveal a transcendence of cultural boundaries, heightened awareness, and dissolution of rigid ego structures, leading to a more fluid and expansive sense of self. Their self-identity and their consciousness expand, and they participate in the emergence of multiculturalism beyond borders. Multiculturalism suggests "a human being whose identifications and loyalties transcend the boundaries of nationalism and whose commitments are pinned to a larger vision of the global community" (Adler, 1977, p. 24). It refers to the citizens of the world, this twenty-first-century utopia. Adler (1977) posited that "the multicultural person embodies attributes and characteristics that prepare him or her to serve as a facilitator and catalyst for contacts between cultures" (p. 38).

Implications for Aging and Retirement

The findings challenge conventional narratives about aging and retirement, suggesting that this stage of life can be one of growth, exploration, and active engagement with the world. Retirees like the participants indicated that retirement can be a period of significant personal and spiritual development, redefining societal attitudes toward aging. They found new purposes and passions that reinvigorated their lives. In this new liminal space, expatriates found kinship with like-minded individuals, forming a new definition of “family.” This newfound sense of belonging significantly enhanced their well-being and provided a sense of freedom and belonging beyond traditional national borders, pointing to the emergence of a new, more multicultural, or nomadic class of citizens.

Redefining Aging and Retirement

The experiences of these retirees challenge conventional narratives about ageing and retirement. Traditionally, retirement is often viewed as a period of withdrawal and decline. However, for these expatriates, retirement has become a stage for growth, exploration, and active engagement with the world (Zweig, 2021). This shift has implications for how societies view ageing populations, suggesting a need to reevaluate policies and cultural attitudes to better support and harness the potential of older adults.

Retirement is considered in Western societies as the social marker of old age. However, the participants show that this is not the case. Retirement was for them the beginning of a more fulfilling life corresponding to their dreams or their personality. Life possesses an inherent ability for renewal. While it exists independently, it simultaneously relies on others, forming ecosystems that continually evolve, as evidenced by the communities built by these expatriate retirees. Unintentionally, they disrupt established norms, paving the way for a more inclusive and transformative society.

Limits and Implications for Future Research

The study’s findings, based on four participants, offer qualitative insights but have limited generalisability, highlighting the need for further research into the personal transformations and sociocultural dynamics of expatriation. Future research should include larger and more diverse samples and employ longitudinal studies to understand the evolution of gerotranscendence in expatriates.

Second, the study relied on self-reported data, which may be subject to biases such as selective memory, social desirability, and personal interpretation. Although measures such as member checking were employed to enhance the accuracy of the data, these biases cannot be entirely eliminated.

Third, the study’s qualitative nature, while allowing for in-depth exploration of personal experiences, may not capture the full spectrum of factors influencing the expatriation experience. Incorporating quantitative methods in future research could help to triangulate the findings and provide a more robust analysis.

Finally, the study's focus on the transpersonal and psychological aspects of expatriation means that other important dimensions, such as economic, legal, and health-related factors, were not explored. Future research should consider these dimensions to provide a more holistic view of the expatriation experience.

Conclusion

This study revealed that self-initiated expatriation in retirement is not merely a geographic relocation but a deeply transformative journey that significantly impacts retirees' psychological and spiritual well-being. The findings highlight that through the process of moving abroad, retirees undergo a reconfiguration of personal identity, develop new social bonds, and experience profound shifts in self-understanding. These insights challenge conventional views on aging and retirement, suggesting that this stage of life can be one of growth, exploration, and active engagement with the world. By providing a deeper understanding of the transpersonal effects of expatriation, this research contributes valuable knowledge for scholars, policymakers, and individuals considering this life choice.

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