€TRAINING

Retirement Planning

11 - 15 November 2024
Boston (USA)

Retirement Planning

REF: H2058 DATE: 11 - 15 November 2024 Venue: Boston (USA) - Fee: 7085 Euro

Introduction

Considering retiring from a full-time job? Have you prepared? Employees are led through five days of engaging, activity-filled sessions in the Retirement Planning RP training course that cover everything from retirement benefits to work-life balance.

The employee benefits and financial aspects of retirement planning have traditionally been emphasized in training courses on retirement planning. Personal planning is crucial since it affects how satisfied you are with your retirement lifestyle. Because it identifies your sources of income and expenses and develops your retirement budget based on your unique strategy, financial planning is important.

In addition to these crucial topics, our dynamic and inclusive Retirement Planning also focuses on more private concerns including work-life transitions, emotional readiness, and new or part-time employment.

Course Objectives

At the end of this course, participant will be able to:

- Take ownership of and accountability for your retirement strategy.
- Describe the next topic in your life that best fits your personality, interests, needs, and current situation.
- Create your holistic retirement plans, taking into account your spiritual, physical, intellectual, career, emotional, social, and financial SPICES/F aspects of life.
- To reach your financial well-being goals, make wise choices about the creation, protection, and distribution of your wealth via investments, insurance, wills, etc..
- Renew yourself and design rewarding retirement lifestyles
- Make the most of your senior years in terms of personal choice and self-awareness.

Targeted Audience

- Retiring mandatory or voluntary Employees
- Spouses of Retiring Employees

Course Outline

Unit 1: Healthy Ageing

- Common Causes of Death in People
- 5-Step to Healthy Ageing
- Supporting a Healthy Lifestyle
- Enjoying Your Leisure Time
- Tips for Optimizing Leisure Time
- Stress Management

Unit 2: Gearing Up To Your Retirement

- What is Retirement?

- Multiple perspectives of Retirement
- Major Life Issues Confronting 50-plussers
- Traits of Highly Successful Retirees
- Three Boxes of Life
- The SPICES/F of Life in Retirement
- Six Categories of Planning for Successful Retirement
- Three Core Ingredients for Autonomy and Self-realization

Unit 3: Emotional & Mindset Management

- Reinventing Your Life with Imagination
- Benefits of a Strong Support Group
- Circles of Support - Intermediate / Outer / Peripheral Circles
- Create a Better You & Family Support
- Barriers to the Good Life
- Undiscovered vs. Discovered Self
- Guidelines for Managing the Stresses Associated with Life Change and Transition
- Growth Potentials vs. Losses in Senior Years

Unit 4: Financial Planning and Management

- Financial Planning for YOUR Retirement
- Setting Your Retirement Goals
- Understanding Your Financial Net Worth
    - Evaluating Your Present Lifestyle
    - Managing Your Issues
- Steps in Setting Your Retirement Goals
    - Managing Your Risk
    - Estimating Your Future Expenses
    - Issues Relating to Retirement
- Creating Wealth - Investing Fixed vs. Equity
- Protecting Your Wealth & Health - Insurance
- Distributing Your Wealth - Estate Planning

Unit 5: Employment Continuity and Professional Enhancement

- Choices and Activities in Retirement
- Main Factors to Work during Retirement
- Employment Opportunities in the 50s
- Ingredients for Self-exploration
- Knowledge You Bring into Retirement
- Techniques to Choose Your Post-retirement Career
- Habits of Self-made Millionaires
- Professional Pursuit - 2nd and Subsequent Career