



LET'S TALK ABOUT RETIREMENT

Pre-retirement Seminar

On

Date

Facilitator:

To be held at:

Name of facilitator

Venue address & tel number



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Aims/What You Will Gain

The Seminar is aimed at staff who, approaching retirement, wish to take some time to consider and plan for their future.

In a relaxed and informal setting with an opportunity to address your individual needs you will gain:

- time to consider a wide range of retirement issues
- professional advice, information and ideas on:
 - health and welfare
 - financial planning
 - pensions and state benefits
 - use of leisure time
 - work options
 - wills and power of attorney
 - planning and managing change

so that you can make choices for your future

- an opportunity to think about what you really want for the future
- confidence to plan for a fulfilling life
- a chance to identify and select next steps
- helpful and informative leaflets, booklets and handouts on the issues covered during the seminar for your future reference



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Day 1 – Date

- 09.30** **Arrival and Coffee**
- 09.40** **Welcome and Course Introduction**
- 10.00** **Retirement – Challenges and Opportunities**
– A chance to consider your initial feelings as you face retirement
- 11.00** **Coffee**
- 11.15** **Healthy Living in Retirement**
– A qualified doctor will look at promoting and maintaining health and fitness for an active lifestyle
- 12.15** **State Benefits**
– State Benefits that are available to retirees
- 13.00** **Lunch**
- 14.00** **Understanding Taxation, Investment and Money Management**
– An independent financial adviser from Jelf Financial Planning will talk and answer questions about the principles of:
- the need for financial planning
 - the tax system
 - the need to consider inflation
 - a strategy for investment
 - choosing a financial adviser
- 15.00** **Tea**
- 15.15** **Understanding Taxation, Investment and Money Management**
(continued)
- 16.15** **Reflecting on Today**
- 16.30** **Close**



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Day 2 – Date

- 09.30** **Arrival and Coffee**
- 09.40** **Introduction to the Day's Programme**
– Planning and setting goals
- 09.55** **Maintaining and Developing Relationships in Retirement**
– A chance to reflect on the impact of retirement on personal relationships; opportunities for the future
- 10.30** **Coffee**
- 10.55** **Planning and Managing Change**
– Discuss experience gained from coping with other changes in life; lessons for the future
- 11.30** **Legal Matters**
A lawyer from Hart Brown Solicitors will discuss:
- the importance of making a will
 - Inheritance tax
 - Lasting Powers of Attorney
 - The possibility of making an Advance Decision (formerly known as a living will)
- 12.30** **Lunch**
- 13.30** **Case Studies**
– Discuss the issues and suggest how to move forward
- 14.30** **Tea**
- 14.45** **Getting Started**
– An opportunity to explore how best to use your time when retired.
- 15.45** **Course Review and Evaluation**
- 16.30** **Close**