

Course duration: One day 9am – 4.30pm

Maximum number of delegates: 20

Course Aims

This course is designed to be run in-house for organisations with occupational pension schemes. It is aimed at staff up to 5 years before their expected date of retirement and employers may offer places to the partners of their staff. The course will enable staff to think ahead to retirement and consider financial planning, pensions, wellbeing and enjoyable activities. There will be time for personal planning. In addition to the course tutor, the course will include a section where a suitable member of staff from the organisation will give a presentation on the occupational pension scheme.

Target audience

Employees aged 50+ from Local authorities, NHS organisations, other public sector organisations or larger employers with in-house occupational pension schemes.

Objectives

- ✓ Explore the implications of retirement in relation to finances, lifestyle and wellbeing
- ✓ Explain the in-house occupational pension scheme
- ✓ Describe financial planning and investment options in retirement
- ✓ Enable participants to develop individual action plans

Learning Outcomes

By the end of the workshop delegates will be able to

- Identify opportunities and threats to their wellbeing and lifestyle in retirement
- Identify ways of maximising income in retirement
- Understand clearly their occupational pension scheme
- Understand why professional advice can help with financial planning and investment in retirement
- Identify actions and goals relevant to them as individuals.

Proposed Lesson plan/content:

09.00 Welcome and sign in

9.05 Introduction, ground rules and practical information

9.15am - What do work and retirement mean to you? Small groups discussion and feedback

9.45 am - Some retirement facts – presentation and discussion

10.00 - Morning coffee/tea

10.15 - The state pension – a brief overview

10.30 - Your health and wellbeing in retirement – group work

11.15am - Your occupational pension (in-house presenter)

12pm - Keeping busy in retirement

12.30pm - Lunch

1.30pm - Legal matters – Property ownership, wills and powers of attorney – a brief overview

2pm – Managing your money and maximising resources in retirement

3pm – Afternoon coffee/tea

3.15pm – Personal retirement planning

3.45pm – Conclusions – group discussion and final questions

4.15pm – Evaluation

4.30 Close

About the trainer

Mary Anne Crook is a former Health Promotion Specialist in the NHS where she delivered training for 20 years as part of her job, taking early retirement in 2012. Now an independent self-employed trainer, she has been delivering courses on behalf of training agencies and directly to clients in health, social services, local authorities, the voluntary sector, emergency services, housing organisations, youth organisations etc. One of her main areas of expertise is Pre-retirement planning. As well as herself experiencing early retirement, she has trained with the Pre-retirement Association of Great Britain and has delivered to many people planning to retire throughout the public sector.

Mary Anne delivers to a very high standard, with excellent skills in the presentation of information and facilitation of interactive learning and practice. With extensive course writing experience, she can adapt courses to meet the specific needs of different clients