

# Getting

Retirement Planning (lifestyle, financial)  
for your employees age 50 and over

# Ready 2 Retire

An interactive workshop to guide your employees through one of the most difficult transitions in a lifetime: Retirement from Work.

## Getting Ready 2 Retire will help your organization by...

- Giving your employees permission to start discussing their retirement plans – both in the workshop and with their manager
- Alleviating the stress on an employee worried about the unknowns (financial, lifestyle, family) of retirement
- Initiating the development of a plan to transfer the retiring employee's knowledge and expertise to others within the organization.

## Getting Ready 2 Retire will help your employees by...

- Providing a non-threatening, open forum for employees to discuss retirement planning
- Encouraging them to start answering some of their retirement questions:
  1. What will I do when I retire?
  2. What income level do I need to retire comfortably?
  3. When will I retire?

## This workshop will provide:

- a review of current trends in life expectancy, inflation, selecting a retirement date, and viewing retirement as the next phase of living
- an opportunity for participants to begin work on their personal retirement plans for work, leisure, residence, family, etc.
- an overview of your organization's policies as they relate to retirement (benefits, transition, timing etc.)
- information on the value and use of wills, trusts, powers of attorney, estate organization, etc.
- real-life examples plus worksheets to project income needs and record all potential sources of income
- answers to key retirement, investment & income option questions
- checklists of items to review in the years preceding and following retirement: 10–15 years prior, 5 years prior, 1 year, 3-6 months, etc.

## Each participant will leave the workshop with:

- A **Getting Ready 2 Retire Workbook** full of valuable information to help develop lifestyle and financial plans for retirement, plus a comprehensive list of additional resources (articles, books, magazines, web sites).
- A **Retirement Planning Tool Kit** filled with checklists, worksheets, personal inventory tools... all designed for participants to complete at their leisure, and in concert with their family and/or friends.

## Participant feedback on the workshop:

*"It answered a lot of questions for me and reawakened me to a lot of issues that need to be dealt with in the near future"*

*"It was delivered with samples that were easy to understand"*

*"I am now going to share the information with my spouse, peruse the material closely, and use the worksheets to shape our planning"*

## For more information:

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