

# € TRAINING

Retirement Planning



28 October -  
1 November 2024  
Lisbon (Portugal)



# Retirement Planning

REF: H2058 DATE: 28 October - 1 November 2024 Venue: Lisbon (Portugal) - Fee: 5940 Euro

## Introduction:

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.

## Program Objectives:

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

- Take ownership of and accountability for their retirement strategy.
- Describe the next topic in their life that best fits their personality, interests, needs, and current situation.
- Create their holistic retirement plans, taking into account their spiritual, physical, intellectual, career, emotional, social, and financial SPICES/F aspects of life.
- Reach their financial well-being goals, make wise choices about the creation, protection, and distribution of their wealth via investments, insurance, wills.
- Design rewarding retirement lifestyles.

## Targeted Audience:

- Retiring mandatory or voluntary Employees.
- Spouses of Retiring Employees.

## Program 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.