

# PLANNING FOR YOUR RETIREMENT WORKSHOPS

INFORMATION FOR  
EMPLOYERS,  
HR AND OPERATIONS  
MANAGERS



"This course  
was more  
valuable to  
me than a gold  
watch"



"Good pace, great  
presentations,  
everyone should do  
this course. Even young  
people"



# How helping employees plan for their future retirement could also benefit your organisation?

The demographic profile of the workforce is changing as people are living and working for longer. Population projections show that as the older (50+) age group increases fewer younger people will be entering the workplace placing increased dependence on older working age employees. Flexible retirement and higher pension ages will also mean that many people will work beyond the age of 64 either through choice or necessity.

An increasingly ageing workforce means it is even more important that you help your employees plan for their future. Our one-day "Planning For Your Retirement" workshops are designed for your employees who are planning to leave employment in the next 10-15 years. The workshops enable businesses such as yours to recognise and support employees as they move towards this major life transition.

## Attending the workshop will enable:

- Your employees to feel more informed in all aspects of retirement planning and able to formulate a clear personal retirement action plan, including how to have timely discussions with their managers
- Managers to respond more effectively to skills management, resource and succession planning issues in your workplace
- You, as an employer, to support your employees and recognise them for their service and contribution
- You to create a culture of support and transparency and give all involved the confidence to have discussions about retirement, skills and knowledge retention and succession planning

"What distinguishes high-performing organisations from under performing ones is that successful organisations understand that retirement planning is a core part of human resource management." (International Institute for Management Development)

## Why learn with Age UK Lancashire?

Age UK Lancashire is the local expert on later life issues having provided information, advice and support to older people and their carers for the past 75 years.

We are uniquely positioned to provide you and your employees with practical, informed and legislatively current retirement planning training.

Flexibility of choice: employees can either attend an open course alongside delegates from other organisations or we can tailor an in-house workshop specifically for your staff.

Workshops are delivered by carefully selected solicitors, independent financial advisers and health trainers based in your locality.\*

We are "Loyal to Lancashire." All profits raised through the delivery of these workshops will be used to support older people in Lancashire, Blackpool and North Sefton.

## Who should attend?

Our workshops are designed for people planning to leave employment within the next 10-15 years. However, the earlier individuals start to plan for retirement the better so everyone is welcome.

## Content

A full day workshop provides independent and impartial advice in the following four areas:

### Money and Tax

- Understanding pensions and your options
- Financial planning
- Making the most of your money
- Savings and investments

### Legal issues

- Wills
- Lasting Powers of Attorney
- Advance Care Planning
- Equity release

### Health & Wellbeing

- Keeping active
- Maintaining strength and balance
- Mindfulness
- Nutrition

### Planning your time and activities in retirement

- Managing change and transition
- Opportunities and challenges to be aware of
- Planning your time and keeping connected
- Action plan for your future

\*Age UK Lancashire uses a transparent and open process to choose the Solicitors, Independent Financial Advisors and Health Trainers who deliver the technical content on the workshops. We have clear expectations and criteria for choosing each business who delivers sessions on our workshops. Age UK Lancashire are not an introducer and we are not paid by the businesses who are delivering the course modules. Age UK Lancashire's role is to facilitate the workshops and we are not responsible for the technical content.

"Inspired me to put a plan in place"

"Thank you for the sessions, planning can be fun!"

## Costs

Individual	£190 (+VAT)
Individual and partner	£320 (+VAT)
Block of 10 places (valid for 24 months)	£1,710 (+VAT) (10% saving)
Block of 20 places (valid for 24 months)	£3,040 (+VAT) (20% saving)

## In-house workshops:

We can run bespoke in-house workshops designed specifically for your staff:

- Fixed price of £1,975 (+VAT) for up to 16 delegates or £1,710 (+VAT) if held virtually over Teams or Zoom
- The option of adding bespoke content to ensure the day is as relevant as possible for your staff
- Minimal travel required for delegates, as we can run workshops at any of your locations in Lancashire or virtually
- Personalised marketing materials can be supplied to promote workshops internally

"Well balanced day of professional presentations which should have given all delegates food for thought"

## Further information and booking

Courses can be booked online on the 'Our Services' page at:

[www.ageuklancs.org.uk](http://www.ageuklancs.org.uk)

To discuss booking an in-house workshop or for further information please contact Anne Oliver:

 **07807 338783**

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