

PLANNING FOR RETIREMENT: MANAGING YOUR LIFESTYLE, LEGACY AND PORTFOLIO

HUMAN RESOURCES PORTFOLIO



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PLANNING FOR RETIREMENT: MANAGING YOUR LIFESTYLE, LEGACY AND PORTFOLIO

COURSE OUTLINE

Retirement can look often appear to be a distant paradise but may also be daunting. The current demands placed upon us leave little time to ponder our retirement, which is essentially the last transition in our lives. Prior planning is therefore an important factor for a successful retirement.

In this highly interactive programme, which draws on the latest tools, support and research into retirement, participants will be taken through a personal transformational journey to help them make the transition and overcome the practical and emotional challenges they will face going into retirement.

This workshop will focus on self-discovery and the personal skills required to make the necessary changes, embrace new activities and achieve a balanced and rewarding lifestyle in retirement. Key insights into all aspects of planning will enable participants to define and manage their legacy, their lifestyle and their portfolio of activities in a financially sustainable way.

COURSE OBJECTIVES: On completion, you will be able to:

- Understand their own personality - the way they live their life; what matters to them; how they make decisions and the legacy they leave behind
- Reflect on their career and their unique set of talents, and appreciate their impact on others
- Identify methods of support during this challenging transition
- Consider and plan new ways of being productive and giving back to others
- Understand and use interpersonal skills and behaviours to make their retirement plan work
- Plan to maintain physical health and fitness, and embrace relaxation techniques and a curiosity for learning
- Appreciate the fundamentals of financial planning

KEY TOPICS

- Self-analysis of personality preferences
- Realising your legacy
- Key values and beliefs – reflecting on your career, milestones, talents and retirement drivers
- Dealing with change and seeking support in retirement
- Skills to realise a retirement plan: communication style, influencing, and presentation skills
- Being productive, e.g. through consultancy skills, advisory work, coaching and mentoring, and training work
- Giving back through charity or voluntary work
- Planning leisure time – strategies for health, fitness, relaxation, enjoyment and lifelong learning
- Financial planning: income strategies, budgeting and managing your investment portfolio

DURATION	FEE	DATE	VENUE
05 days	£2,650	13 - 17 May 2024	London

“ON DEMAND” COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.

“The course has exceeded all objectives...[and] has given me the confidence to contribute to talent succession and performance management in my organisation...excellent - very impressed with the quality of training.”

JESSICA KITAKULE-MUKUNGU, VP Human Resources, African Development Bank, Cote D'Ivoire.
A delegate attending Succession Planning, Talent and Performance Management.



FEATURED TRAINER MARIA OLDER

Maria is a charismatic and solution-focused facilitator who designs and delivers innovative training that focuses on individuals' needs and their unique learning journey.

Through her extensive international experience, she has an in-depth appreciation of how to bring learning to life.

A highly inspirational leadership and development professional, Maria has over 30 years' experience of delivering pragmatic and practical training across North America, Canada, Europe, Africa and Asia. With a focus on the practical applications of training materials, her coaching style encourages delegates to drive and implement change at both the individual and organisational level.