

Retirement Planning for Executives

Preparing to retire successfully!

Includes Coaching Sessions

Overview - Why Take This Course

Retirement is no longer a distant reality. As an executive, you recognize the importance of planning for your retirement, the challenge is to find the time while you are going full out at work, to get the critical information you need to inform some of the most important decisions you will make. Designed by executives for executives, this one-day workshop will cover most of what you need to know about financial considerations, and equally important, information tied to planning for your transition to retirement. This course will help you to demystify many elements at play, such as key considerations around your pension, selecting a retirement date, the process, what you need to be doing in your last few years prior to retirement, options tied to transitioning to retirement, working after retirement from the public service and retiring well. The course brings it together for you, so that you can be prepared to embrace a successful retirement with confidence.

Value-add – Coaching

As a participant of this workshop, you will receive two one-hour individual coaching sessions: one session with a PSPC-certified PSSA and financial advisor; and one session with a retirement planning coach for executives. The coaching will allow you to address questions specific to your own personal situation and explore topics in a 1:1 format with a coach, such as your pension details, the selection of your retirement date, how to minimize penalties, and tangible and practical options to assist you in planning for a smooth transition to your new adventures.

Audience

The course is designed specifically for Public Service Executives who are planning to retire within the next few years and who are looking for concrete answers to set or strengthen their retirement plan. Partners of executives are also invited to attend at no cost.

As the topics covered are focussed on the needs of executives, only participants at the executive level will be accepted on the course.

Price \$795.00 plus HST

Duration One Day, plus two one-hour individual coaching sessions

Topics

Participants in this course will benefit from learning about:

- Establishing your retirement vision, building on your dreams and life goals and putting your passion into action
- What to consider prior to retiring
- Understanding the A-Z of the Government of Canada employee pension plan (PSSA) and key considerations for executives
- Exploring critical elements of strong financial planning
- Selecting a date and looking at the process of retiring
- Understanding and preparing for the changes that will affect your life
- Retiring, Re-energizing, Refocussing and Reinventing
- Working post public service retirement – what to consider
- Embracing this new phase of life