



4D Training

Pre Retirement Course

Who would benefit?

This is an interactive workshop aimed at those who are soon to leave the organisation either to retire from working altogether or hoping to take on another job, be it full-time, part-time, self employed or working for a charity. The course is about coping with change and looking forward to the future with enthusiasm.

Objective

The course is designed to enhance the importance of personal and financial planning for the future, to give relevant information so that individuals can make their own informed decisions and to ensure that individuals are as prepared as they can be for whatever opportunities arise.

Content

- Welcome and introductions
- Retirement – the opportunities ahead
 - Essentials for a successful retirement
 - Planning for your future
- Financial Planning
 - Budgeting
 - Taxation
 - Pension decision
 - Investment choices and strategies
 - Wills and trusts
 - Power of Attorney
- State benefits
- Your Company Pension
- Time on your hands
 - Adjusting your lifestyle
 - Work vs retirement
 - Basic needs for a happy retirement

Duration

One day

Trainer

This course is delivered by Gavin Gordon, a facilitator for Pre Retirement courses, worked for many years at the Bank of England with his final position as Manager, Pension Fund, Loans and Welfare. He then delivered Pre Retirement courses to many companies through Towry Law Group. He is an Associate of the Institute of Bankers, Chairman, City of London Citizens Advice Bureau, Chairman, Greater London Association for Pre-Retirement and has been granted the Freedom of the City of London. He also has the CII Certificate in Financial Planning.

The 'Company Pension Fund' section can be either delivered by your company's pension provider or one of our speakers from an independent City company.

The Financial Planning section will be delivered by an Independent Financial Adviser.