

# Dynamics of Retirement Planning

## Introduction

Is retirement a dream to come true, or something to be anxious and fearful about? Can we afford to enjoy a lifestyle of health, wealth and happiness? How will I spend the next 20, 30 or 40 years 'unemployed'? Will I be bored to death or happier and more fulfilled than I have ever been? These are some of the many questions that are asked by pending retirees.

In this workshop, these and other challenging will be address and the framework for a retirement plan developed.

## Learning Objectives

By the end of this workshop, participants will:

- Explore the issues and challenges of retirement – what to do with the next phase of life.
- Clarify their post retirement values and needs
- Understand the importance of health and fitness
- Explore the options and choices in wealth planning
- Agree on a personal ideal life-style and how to plan for its realization
- Share some cases of successes and failures in retirement planning – and the lessons learnt.
- Have the formulation for a successful retirement plan

## Workshop Methodology

Workshop design incorporates a variety of methods to both stimulate active learning and appeal to the mix of participants preferred learning styles. Building on participant personality traits and lifestyle needs, a number of interactive exercises, and group discussion will help them to understand the different issues and challenges of retirement. Where appropriate, selected multimedia, video or power point visuals augment a comprehensive manual of notes. The workbook is professionally laid out, appealing to the learner and capturing key learning points and post workshop actions

The workshop facilitator who is active in his retirement and married to an Exxon Mobil retiree will also share his personal perceptions on retirement issues.

## Workshop Duration

This can be designed as a 1, 2 or more intensive 3 day workshop, subject to client's needs.

## Workshop Contents

- Options and choices
  - When to retire
  - How to occupy self
  - Your personality type and retirement
- Values & needs clarifications
  - Some are common, some are unique
- Major issues and priorities
  - Health & Fitness
  - Life Style & Happiness
  - Social and Family Obligations
  - Wealth Planning
- The PEMS Model
  - Physical
  - Economic
  - Mental
  - Spiritual
- Health and Fitness Management
  - Achieving Optimum Health
  - Diet, exercise, sleep and managed stress
  - Levels of fitness, agility and mobility
  - How healthy are you?
- Life Style Ideals
  - A week in the life of.....
  - A busy brain is a healthy brain
  - Use it or lose it
- Social, Family Obligations
  - Childrens' Education
  - Clubs, Sports and Hobbies
- Wealth Planning & Management
  - Your asset, liability ratio
  - Your short, mid and long term
  - Income Needs
  - Insurance Needs
  - Investment options
  - National Savings Programs/Pensions
  - Exxon Mobil Retirement Benefits
  - Savings, Unit Trusts
  - Stocks & Shares
  - Property & Land Banking
  - Futures & Money Market Trading

## Facilitator

The workshop facilitator who is active in his retirement and married to an Exxon Mobil retiree will also share his personal perceptions on retirement issues.

He has over 35 years of training and consulting experience as well as having worked for two multi national corporations. Areas of expertise include managing health, fitness and stress. He has authored on several books and one in particular on life and career development and includes subjects on relevant to this workshop.

### Brain Dynamics Global

No:7, Jalan 16/3, 46350 Petaling Jaya

Tel: (603) 7957 1130 Fax: (603) 7957 4571 E-mail: admin@bdglobal.org