

Retirement Planning Program

Preparing Departing Employees for the Next Phase in Their Lives

Benefits of retirement planning

Why are so many companies offering retirement planning to their employees? Because comprehensive and pro-active retirement planning can:

- Remove the obstacles that prevent employees from choosing retirement.
- Improve performance of older workers by reducing their anxiety about organizational changes and early retirement.
- Facilitate retirees' successful and comfortable transition by providing practical strategies, confidence and emotional support.
- Cultivate the goodwill of retirees, other employees and the community by showing the organization's concern for departing workers and their spouses.

Our retirement planning process

Career Directions has developed an interactive, experiential process which leads to practical preparedness and psychological readiness for all the changes of retirement. We prepare employees to take charge of this transition and make necessary decisions. For some, this will be the end of their professional careers; for others, it will mean a career adaptation or new career.

Our Retirement Planning Program can be presented in groups as well as one-to-one. Individual retirement planning can be tailored to senior executives and their spouses. Financial, legal and health specialists are available as consultants.

Program components

Tailored retirement programs may include any of the following:

Retirement readiness evaluation

- Managing the transition - myths, misinformation and attitudes about retirement; accepting losses and gains; values and life purpose
- Career planning - second careers, entrepreneurial work, consulting, part-time work, and volunteer work
- Financial planning - assessment of assets, benefits, Social Security, Medicare and Medicaid
- Legal affairs - wills, estate planning, and long-term health insurance
- Health and wellness - maintenance and prevention through exercise and diet; mental health; coping with crisis, illness and death
- Relationships - changes in relating to spouse, children and friends; self-image issues; eldercare decisions for parents
- Living arrangements - decisions about moving, alternative housing, and life care communities
- Use of time - rebalancing household, leisure and work-related activities



**Career
Directions**
*Career Management
and
Leadership Coaching*

101 North Main Street

Suite 850

Ann Arbor, MI 48104

Tel: 734.663.0677

Fax: 734.663.3670

Email: dg@cdepi.com

Web: www.cdepi.com