HR Management · HR63

# Retirement and Employee Investment Planning

Barcelona (Spain) · 21 - 25 Dec 2026

| Date | Venue | Duration |
|---|---|---|
| **21 - 25 Dec 2026** | **Barcelona (Spain)** | **1 Week** |
| Fee | Ref | Language |
| **£5,000 GBP** | **HR63** | **English** |

## Introduction

Are you planning to retire from full-time employment? Are you prepared? This course walks representatives through a 5-day interactive and activity-packed session covering everything from retirement benefits to work-life balance.

Traditionally, separation planning programmes focused on the associated benefits and financial factors associated with retirement planning. Personal planning is essential because it determines your level of comfort with your retreat lifestyle. Financial planning is important because it identifies your sources of income and expenses and creates a retirement budget based on your plan.

Our effective and collaborative RP addresses not only these significant issues, but also more personal issues such as work-life balance, emotional readiness, and new or part-time employment.

### This course will highlight:

- Retirement (voluntary or mandatory) is the next phase of a career which should be designed just like it was with the preceding phase of productive employment
- This endless course requires one to be regarded holistically, enabling one to psychologically and intellectually prepare for a successful, prolific and optimal life in retreat
- Relinquishment paradigm shift – “We retire to something, rather than from something”
- The retreat is the “3rd Box” of life consisting not only of leisure but also contents of all the previous two “Boxes”, i.e. learning & self-development and productive life
- The retirement journey must be navigated with appropriate knowledge, skills, and abilities for optimal fulfilment and satisfaction

## Course Objectives of Retirement and Employee Investment Planning

### At the end of this course on Retirement Planning (RP), you will acquire to:

- Assume accountability and responsibility for your retirement plan

- Profile your next theme of life that suits your character, interests, needs and current circumstances
- Develop your holistic retirement plans encompassing Spiritual-Physical-Intellectual-Career-Emotional-Social & Financial (SPICES/F) of life
- Make sound decisions to create (invest), protect (insure, etc.) and distribute (wills, etc.) your wealth to achieve your financial well-being targets
- Live a renewed life and create fulfilling retirement lifestyles
- Optimise your senior years in terms of personal freedom and self-realisation

## Course Methodology of Retirement and Employee Investment Planning

This exciting and empowering Horizon Plus Retirement Planning training programme is transferred using short, focused presentations which are followed by experiential learning workshop sessions. In these sessions, the knowledge gained is applied to real-world examples and case studies. Rapid learning of the methods and techniques is achieved using group work, individual work, participant discussion, facilitator interaction, and constructive feedback.

## Organisational Impact of Retirement and Employee Investment Planning

A retirement plan has the potential to provide significant benefits and savings to both the organisations and their employees.

### The employer reaches to:

- Enhance employee motivation and productivity
- Become a caring employer
- Attract and keep valuable employees
- Gain a recruiting advantage

## Personal Impact of Retirement and Employee Investment Planning

Planning in any discipline and walks of life always add value and bring substantial advantages to the practitioners.

### For anyone who plans for his/her retirement, they reach to:

- Attain peace of mind - planning not only reduces your stress during retirement but also in the years leading up to it
- Optimise your retirement days in ways that suit your current situations
- Attain a more financially sound future
- Make more efficient career-related and general financial decisions before retirement with appropriate planning
- Make sure your plans work well with other relevant parties
- Decrease overall expenses of living with proper planning

## Target Audience of Retirement and Employee Investment Planning

**This comprehensive course on retirement planning is planned for anyone engaged in having a meaningful retirement whether you are near the end of your current career or at the beginning.**

**The course focuses on the requirements of people who design to retire within the near future as well as those who will reach retirement eligibility within the next 5 to 10 years but will greatly benefit from:**

- Retiring (mandatory or voluntary) Employees
- Spouses of Retiring Employees

# Course Outlines of Retirement and Employee Investment Planning

## DAY 1

### Gearing Up To Your Retirement

- What is “Retirement”?
- Multiple perspectives of “Retirement”
- Major Life Issues Confronting
- Traits of Highly Successful Retirees
- Three “Boxes” of Life
- The SPICES/F of Life in Retirement
- Six Categories of Planning for Successful Retirement
- Three Core Ingredients for Autonomy and Self-realisation

## DAY 2

### Emotional & Mindset Management

- Reinventing Your Life with Imagination
- Benefits of a Strong Support Group
- Circles of Support – Intermediate / Outer / Peripheral Circles
- Create a Better You & Family Support
- Barriers to the Good Life
- Undiscovered vs. Discovered Self
- Guidelines for Managing the Stresses Associated with Life Change and Transition
- Growth Potentials vs. Losses in Senior Years

## DAY 3

### Financial Planning and Management

- Financial Planning for YOUR Retirement
- Setting Your Retirement Goals
- Understanding Your Financial Net Worth
    - Evaluating Your Present Lifestyle
    - Managing Your Issues
- Steps in Setting Your Retirement Goals
    - Managing Your Risk

    - Estimating Your Future Expenses
    - Issues Relating to Retirement
- Creating Wealth – Investing (Fixed vs. Equity)
- Protecting Your Wealth & Health – Insurance
- Distributing Your Wealth – Estate Planning

## DAY 4

## Healthy Ageing

- Common Causes of Death in People
- 5-Step to Healthy Ageing
- Supporting a Healthy Lifestyle
- Enjoying Your Leisure Time
- Tips for Optimising Leisure Time
- Stress Management

## DAY 5

## Employment Continuity and Professional Enhancement

- Choices and Activities in Retirement
- Main Factors to Work during Retirement
- Employment Opportunities in the ’50s
- Ingredients for Self-exploration
- Knowledge You Bring into Retirement
- Techniques to Choose Your Post-retirement Career
- Habits of Self-made Millionaires
- Professional Pursuit – 2nd and Subsequent Career

### Register or ask about this course online

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