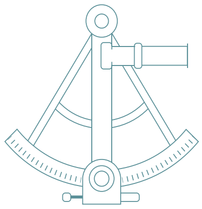
RETIREMENT LIFE PLAN

Retirement Life Planning Course

Helping clients to plan for a satisfying and fulfilling new life in retirement



One in three people struggle with retirement life, even when finances are in order. The Retirement Life Planning Course provides a research-based exploration of the social and psychological side of the retirement transition. Through this self-study course, you will become familiar with issues that are central to retirement wellbeing, and you will become equipped to support clients with holistic retirement life planning. Retirement life planning helps clients clarify visions for their retirement lifestyle, reduces feelings of uncertainty and anxiety, and increases confidence and wellbeing in the transition.

The course covers:

- Retirement beliefs, personal adjustments, and experiences that influence retirement wellbeing
- Life planning strategies for key areas of retirement wellbeing
- Case studies presenting unique retirement scenarios and challenges calling for different approaches to life planning
- A clear process for guiding clients through retirement life planning

Included in the course

- 10 self-study modules (approximately 8.5 hours)
- Reflective exercises and handouts
- Online instructor access
- Optional live Q&A webinar
- Retirement Life Planning Training Manual
- A copy of the book, Retirement Life Plan: Navigating the transition from a rewarding career
- Retirement Life Planner Badge to use upon successful completion of the course

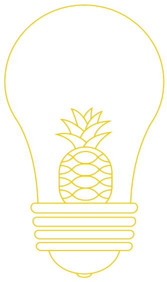
As a result of completing the course, you will be able to:

- Assess the need for planning and adjustment in key areas of retirement wellbeing
- Describe common retirement beliefs and misconceptions
- Recognise retirement types and what these mean for lifestyle preferences
- Identify where clients are in the process of retirement adjustment
- Understand common challenges in the retirement transition
- Implement a clear process to help clients design a satisfying and fulfilling new life in retirement

retirementlifeplan.com hello@retirementlifeplan.com

Who is it for?

The Retirement Life Planning Course is designed for professionals from various backgrounds (e.g., financial planning or human resources) who are working with individuals in the retirement transition, and want to provide more holistic support in transitioning to retirement life.



77%

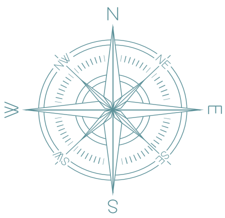
of those planning to retire are looking for resources that go beyond finances

1 in 3

struggle with retirement

85%

of highly satisfied financial advisor clients have discussed future goals and aspirations



The Retirement Life Planning Course will be available beginning **May 1, 2022**.

Registration

The total cost for the course is $1,250 / £950

To register, use the button below or send an email to **hello@retirementlifeplan.com**, specifying your first and last name, and your interest in this course.

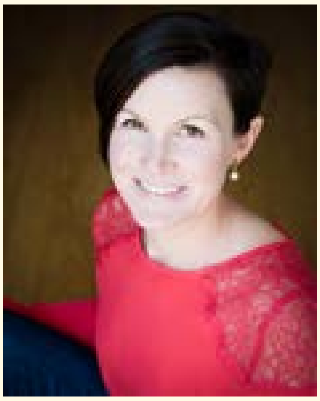
Register

retirementlifeplan.com hello@retirementlifeplan.com

As a retirement coach, I had looked at other certification courses, but they didn't get to the essence of what I wanted to do. Retirement Life Plan immediately made sense to me and I was delighted to be able to take up the training programme offered by Pauline. She really understands that the issue for people facing retirement is not just the practicalities of everyday life, it is primarily the transition from career to the next phase of life. The course has a strong foundation based on Pauline's own research and sets out a clear process for understanding the challenges people face and how to help them navigate a path to a successful retirement. I thoroughly recommend the course to other coaches who work in the retirement sector.

The Story Behind the Course

Pauline Johnson-Zielonka, PhD



With a PhD in Human and Organizational Systems and a background in Industrial Psychology, my work had been focused on wellbeing in the workplace. When I found that existing support for retirement seemed to be insufficient, or was not accessible to pre-retirees, I knew we were letting people down when they hit this phase of life. With so much focus on career development and meaningful work, many people are simply left to figure things out on their own when it comes to finding fulfillment in retirement. It is typically assumed that retirement will simply be an easy and enjoyable change from the demands of work.

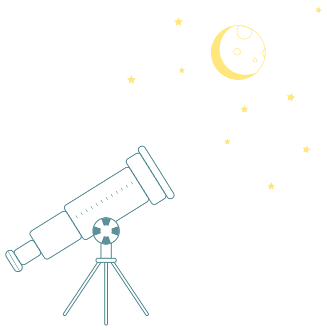
After finishing my doctorate in Human and Organizational Systems at Fielding Graduate University, I devoted my time and energy to understanding more about retirement adjustment and wellbeing. In particular, I wanted to understand the issues and challenges reported by retirees in their transition away from paid work. This needs to be the starting point for improving wellbeing in the transition.

I started Retirement Life Plan after years of research, interviews, and conversations with retirees and pre-retirees. During my doctoral studies, I interviewed pre-retirees about their expectations and experiences in the transition. This is when I realized just how significant, and difficult, this transition is for some retirees.

Having identified various adjustments and experiences with retirement life, I felt this would be best utilized in the hands of existing professionals. I have found that many financial planners, in particular, are very interested in this topic, as they watched their own clients struggle with non-financial aspects of retirement. This led me to design the Retirement Life Planning Course, for those financial planners who want to support clients in preparing beyond finances, for a fulfilling retirement.

Certificate of Completion

A Certificate of Completion and a Retirement Life Planner Badge are granted with participation in all modules, approval of two client case reflections, and a passing score on the final exam.



Course Modules & Webinars:

The modules include videos, reflective exercises, and short quizzes.

MODULE 1.	Introduction: The need for retirement life planning
MODULE 2.	Different views and experiences with retirement
MODULE 3.	The process of retirement adjustment
	Case Study Assignment 1
MODULE 4.	Anchors of retirement wellbeing
MODULE 5.	Who you are: Identity adjustments
MODULE 6.	What you do: Daily occupations and pursuits
	Case studies and discussion
MODULE 7.	Who is involved: Social networks and relationships
MODULE 8.	Who is involved: The family context for retirement
MODULE 9.	How you structure it: New meanings for time management
MODULE 10.	A model for retirement life planning
	Case studies and discussion
POST-COURSE ASSESSMENT.	Assessment for course completion includes a passing score on the final exam and approval of reflections on 2 client cases.