Training course on Advanced Pre-Retirement and Severance Planning

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

<!-- [if gte mso 9]>

Programme Curriculum

Training Course on Advanced Pre-Retirement and Severance Planning

Introduction

As individuals approach retirement, the intricacies of pre-retirement and severance planning become paramount. **Training Course on Advanced Pre-Retirement and Severance Planning** is designed to equip participants with advanced strategies to navigate the complexities of retirement preparation and severance packages. With the evolving workplace landscape, understanding the nuances of financial planning, legal implications, and benefits optimization is essential for ensuring a secure transition into retirement. Participants will explore various aspects of retirement planning, including tax implications, investment strategies, and the management of severance benefits.

This course targets professionals who aim to enhance their expertise in pre-retirement planning and severance arrangements. By focusing on practical insights and real-world applications, attendees will gain the tools needed to create tailored retirement plans that align with individual goals and circumstances. The curriculum emphasizes the importance of proactive planning, helping participants identify potential pitfalls and opportunities in the retirement process. Ultimately, this training empowers professionals to guide clients or themselves effectively through the retirement transition.

Course Objectives

1. Understand the fundamentals of pre-retirement planning.
2. Analyze severance package components and implications.
3. Explore tax strategies for retirement and severance benefits.
4. Evaluate investment options for pre-retirement savings.
5. Assess legal considerations in retirement planning.
6. Communicate effectively about retirement planning strategies.
7. Identify common challenges in pre-retirement transitions.
8. Conduct comprehensive financial assessments for retirement readiness.
9. Understand healthcare options in retirement.
10. Explore case studies of successful retirement planning.
11. Foster collaboration among financial and HR professionals.
12. Create actionable pre-retirement and severance strategies.
13. Understanding the role of severance in retirement.

Target Audience

1. Financial Planners
2. HR Professionals
3. Corporate Executives
4. Retirement Advisors
5. Policy Makers
6. Legal Experts in Employment Law
7. Career Coaches
8. Graduate Students in Finance or Human Resources

Course Duration: 10 Days

Module 1: Introduction to Pre-Retirement Planning

- Overview of the retirement planning process.
- Key terminology in retirement and severance.
- Importance of early planning for retirement.
- Understanding the role of severance in retirement.
- Future trends in retirement planning.

Module 2: Understanding Severance Packages

- Components of severance agreements.
- Analyzing severance pay calculations.
- Evaluating benefits included in severance packages.
- Legal considerations in severance negotiations.
- Case studies on effective severance arrangements.

Module 3: Tax Implications of Retirement Income

- Understanding tax obligations on retirement income.
- Evaluating tax-efficient withdrawal strategies.
- Benefits of tax-deferred accounts.
- Analyzing the impact of state taxes on retirement.
- Case studies on tax planning for retirees.

Module 4: Investment Strategies for Pre-Retirement

- Assessing risk tolerance and investment goals.
- Diversifying investment portfolios for retirement.
- Evaluating retirement accounts: 401(k), IRA, etc.
- Understanding market trends and their impact on retirement.
- Case studies on successful investment strategies.

Module 5: Legal Considerations in Retirement Planning

- Overview of employment laws affecting retirement.
- Understanding pension rights and entitlements.
- Evaluating compliance with retirement regulations.
- Engaging legal experts in retirement planning.
- Case studies on legal challenges in retirement.

Module 6: Healthcare Options in Retirement

- Understanding Medicare and supplemental plans.
- Evaluating long-term care insurance options.
- Analyzing healthcare costs in retirement.
- Strategies for managing healthcare expenses.
- Case studies on healthcare planning for retirees.

Module 7: Common Challenges in Pre-Retirement Transitions

- Identifying psychological barriers to retirement.
- Understanding financial pitfalls in retirement planning.
- Analyzing market volatility and its effects.
- Developing strategies for overcoming common challenges.
- Case studies on navigating retirement transitions.

Module 8: Financial Assessment for Retirement Readiness

- Conducting comprehensive financial evaluations.
- Identifying gaps in retirement savings.
- Evaluating personal assets and liabilities.
- Understanding the importance of cash flow analysis.
- Case studies on financial readiness.

Module 9: Collaborating with Financial and HR Professionals

- Importance of teamwork in retirement planning.
- Engaging with HR on severance policies.
- Building networks with financial advisors.
- Sharing best practices and resources.
- Case studies on collaborative retirement planning.

Module 10: Future Trends in Retirement and Severance

- Exploring innovations in retirement planning.
- Impact of technology on financial planning.

- Predictions for the future of severance packages.
- Discussion on sustainability in retirement planning.
- Case studies on emerging trends in retirement.

Module 11: Developing Actionable Retirement Strategies

- Creating tailored retirement plans.
- Setting realistic goals and timelines.
- Engaging stakeholders in the planning process.
- Measuring success and adapting strategies.
- Presenting retirement plans to clients or stakeholders.

Module 12: Staying Informed on Retirement Regulations

- Importance of continuous education in retirement planning.
- Resources for staying updated on regulations.
- Engaging with professional communities and networks.
- Evaluating ongoing changes in retirement laws.
- Case studies on adapting to regulatory changes.

Training Methodolog

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.

- Payment should be made at least a week before the training commencement to FINESKILL TRAINING CENTER account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	18 Sep 2026	Physical	$3,000
14 Sep 2026	25 Sep 2026	Physical	$3,000
21 Sep 2026	02 Oct 2026	Physical	$3,000
28 Sep 2026	09 Oct 2026	Physical	$3,000
05 Oct 2026	16 Oct 2026	Physical	$3,000
12 Oct 2026	23 Oct 2026	Physical	$3,000
19 Oct 2026	30 Oct 2026	Physical	$3,000
26 Oct 2026	06 Nov 2026	Physical	$3,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com