



THE RETIREMENT COUNSELLING SERVICE

REVISED

2021 MIXED COMPANY

RETIREMENT PREPARATION SEMINARS

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EXAMPLE PROGRAMME MIXED COMPANY RETIREMENT PREPARATION SEMINAR

Day 1

9.40am Meet fellow delegates over Tea or Coffee

10.00am INTRODUCTION

10.05am **PREPARING FOR THE NEXT STAGE OF LIFE**

- What will change and how will I cope?
- Less money, more time?
- Effect on partner, family?
- A positive view of the future

10.55am **Tea/Coffee**

11.15am **WHAT WILL THE STATE PROVIDE?**

- How much and when will State pay a pension?
- Possible options to increase your pension
- National Insurance, what it buys and when you stop paying
- Other benefits for you and your family

12.30pm **LUNCH** (with an opportunity for a private word with the Benefits Specialist)

1.45pm **HEALTH IN RETIREMENT**

- Positive health aspects
- Keeping body and mind fit
- The choices open to us

3.15pm **Tea/Coffee**

3.30pm **PLANNING YOUR FUTURE**

- Moving home – pros and cons
- Reorganising your home for retirement
- Security – for yourself, identity and possessions
- Income from your home?
- Private Medical Insurance/long-term care provision

4.30pm **End of Day One**

Day 2

9.30am **REFLECTIONS ON DAY 1**

9.30am **UNDERSTANDING YOUR COMPANY OR PERSONAL PENSION**

- Your options
- Previous pensions

10.30am **A LOOK AT TAX**

- Your personal taxation situation
- Self assessment
- Making the most of independent taxation
- Capital Gains Tax
- Wills and Inheritance Tax

11.30am **Tea/Coffee**

11.45am **INCOME, SAVINGS AND INVESTMENTS**

- Working out your new income - budgeting
- Investments for income and capital growth
- Financial Advisors – how to choose, use successfully and their charges

1.00pm **LUNCH** (An opportunity for a quiet word with the Finance specialist)

2.15pm **USING YOUR RETIREMENT TIME**

- There will be 2000+ extra non-working hours available for
- Developing existing and new interests
- Satisfying ambitions
- Travel and holiday ideas
- Further work opportunities (full, part-time, paid or voluntary)

3.15pm **OPEN SESSION, SEMINAR REVIEW AND CLOSE**

3.30pm **End of Seminar**

MIXED COMPANY SEMINARS

These residential courses, held in specially selected hotels throughout the country, are designed to provide real practical help in assisting employees and their partners make the transition from full-time work towards retirement, recognising that many nowadays are unsure as to whether they can afford/want to stop working.

Social distancing will be maintained, throughout the course, in a Covid secure environment.

The style of our courses is informal and conversational. Co-ordinated by our full-time Facilitators, supported by a team of specialist presenters. We aim to make the seminars informative, stimulating and, most importantly **enjoyable**.

Because we have no connection nor allegiance to anyone in the finance services industry no products or services will be sold. Our aim is to provide attendees with the necessary information to enable them to make informed choices concerning their future. Sessions are flexible. A participative approach is adopted so that the needs of each delegate are met.

The price of these non-executive open seminars is £480 per delegate (£430 Partner)

This provides for the two day programme, overnight accommodation, meals, refreshments and a pdf of our comprehensive information manual.

The Lake District seminar fee is £645 per delegate and £595 partner. This includes 2 night's accommodation, programme, meals and pdf our information manual.

In addition a non-residential seminar will be held in London, March and December

The fee of £385 per delegate £335 (partner) provides for the two day programme, lunches, refreshments plus pdf of manual.

All prices exclude VAT

To make a booking, or for details of our executive/senior management seminars, our bespoke in-house Retirement, Redundancy and Early Planning, face to face or virtual, courses please phone Shirley on 01494 433553 or email us on Shirley@call-rcs.co.uk

Book on the Web

If you prefer you can book places directly from www.the-retirement-site.co.uk

The Retirement Counselling Service SCHEDULE OF MIXED COMPANY RETIREMENT PREPARATION SEMINARS

2021 DATES

AUGUST

9-10 York

JULY

25-27 Lake District

SEPTEMBER

6-7 Canterbury
12-14 Lake District
27-28 Bath

OCTOBER

18-19 Executive Cotswolds

NOVEMBER

1-2 Canterbury
15-16 York

DECEMBER

6-7 London
(non - residential)

MIXED COMPANY HOTELS

THE LEIGH PARK HOTEL, BRADFORD-UPON-AVONBATH

2021

27-28 SEPTEMBER



The Leigh Park Hotel, situated north of the pretty Saxon town of Bradford-upon-Avon and only six miles from the City of Bath, is a classical Georgian Country House standing in five acres of tranquil, landscaped gardens with its own walled garden and vineyard. Privately owned the Leigh Park is a thoroughly relaxing venue with a unique warmth and charm, specialising in personal service to make your stay as comfortable as possible.

www.leighparkhotel.co.uk.

HOWFIELD MANOR HOTEL CANTERBURY, KENT

2021

6-7 SEPTEMBER

1-2 NOVEMBER



Set in 5 acres of gardens, this 12th-century country manor house hotel has cosy rooms with traditional furnishings and decor, and all come with free Wi Fi, satellite TV, mini fridges, and tea and coffee making facilities. Breakfast is served in the oak-beamed, leaded-window restaurant

GRANGE HOTEL, LAKE DISTRICT (Grange-over-Sands)

2021

25-27 JULY
12-14 SEPTEMBER

Set amongst private landscaped gardens and natural woodland, the family run Grange Hotel boasts excellent cuisine, extensive leisure facilities and unrivalled customer care. A short drive to Lake Windermere, Grange-over-Sands is a small Edwardian town known as "the Riviera of the Lakes".

www.grange-hotel.co.uk.



LONDON UNION JACK CLUB (Non Residential)

2021

6-7 DECEMBER

The Union Jack club is situated opposite Waterloo Station and is within walking distance of the Old Vic, the Festival Hall and excellent public transport to the West End of London

www.ujclub.co.uk.



MOUNT ROYALE HOTEL, YORK



2021

9-10 AUGUST

15-16 NOVEMBER

A short walk from the City centre, the family run Mount Royale, a William IV listed building with beautiful gardens and delightful interiors, offers a friendly service in a country house hotel atmosphere.
www.mountroyale.co.uk

EXECUTIVE SEMINARS

THE THREE WAYS HOUSE HOTEL, COTSWOLDS
(home of The Pudding Club)

2021

18-19 OCTOBER

The privately owned Three Ways House Hotel has been the home of the Pudding Club for 30 years. A Cotswold village hotel, a little quirky but very welcoming with log fires in winter and an AA Rosette award Restaurant. The emphasis is on great customer service, they want you to feel at home.

www.threewayshousehotel.com

The executive seminars are designed specifically for executives, senior managers and other professionals.

For further details and a copy of our executive/senior manager brochure please contact us.

COVID 19

Delegates attending our courses will be requested to adhere to any restrictions in place in order to maintain a Covid secure environment. Masks, hand sanitiser and sanitised wipes will be made available.