COURSE TITLE: **Strategic Pre & Post Retirement Planning**

Navigating the Current & Next Phase of Work, Purpose, and Service

RATIONALE

After many years of productive employment and career achievement, many individuals encounter unexpected challenges as they transition into retirement. Rather than experiencing fulfillment and freedom, some retirees face a loss of purpose, emotional distress, financial uncertainty, and social disconnection. In more severe cases, poor adjustment to retirement has been associated with depression and declining overall well-being.

These **challenges often stem** from:

1. -Inadequate preparation for retirement
2. -Rapid societal changes, such as globalization and urbanization
3. -Misconceptions and negative attitudes toward retirement

Despite its significance, retirement planning remains widely overlooked by both individuals and organizations. It is often perceived as a distant concern—until it becomes an immediate reality. This lack of preparedness can result in frustration, underutilized expertise, and reduced quality of life after active service.

This course addresses these gaps by emphasizing that retirement preparation is both a personal responsibility and an institutional priority. While organizations invest heavily in employee productivity during active service, comparatively little attention is given to life beyond employment. Yet retirees continue to serve as ambassadors, mentors, and custodians of institutional legacy.

The course equips participants with practical knowledge, actionable strategies, and a positive mindset to approach retirement as a new phase of purpose, productivity, and fulfillment—rather than decline.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

1. -Apply practical strategies for effective retirement planning and decision-making
2. -Understand key retirement theories and their relevance in a dynamic, modern society
3. -Evaluate how proper preparation contributes to a meaningful and sustainable retirement life
4. -Develop personalized strategies for managing the transition into retirement
5. -Analyse the social, psychological, financial, and spiritual dimensions of retirement

6. Take ownership of designing a purposeful and dignified “sunset life.”

TARGET GROUP

This course is designed for:

1. -Human Resource Managers and Practitioners
2. -Mid-career professionals and pre-retirement employees
3. -Employers and Organizational Leaders
4. -Service providers in religious, nonprofit, and corporate institutions

COURSE DESCRIPTION

This course provides a comprehensive and practical framework for understanding retirement as a life transition rather than an endpoint. It integrates theoretical perspectives, real-life applications, and reflective tools to help participants prepare holistically—financially, socially, psychologically, and spiritually—for life beyond formal employment.

COURSE CONTENT

Module 1: The Concept of Work

1. Understanding work in the 21st century
2. Phases of working life: early career, mid-career, and peak stages
3. Key characteristics and transitions in each phase
4. Faith-based perspectives versus contemporary views on work
5. The relationship between work, identity, and family life

Module 2: **Understanding Retirement**

1. Historical and social evolution of retirement
2. Legal frameworks and social security considerations
3. Faith-based perspectives on retirement
4. Debunking myths and misconceptions about retirement
5. Redefining identity and personal branding beyond employment

Module 3: **Theories of Retirement**

1. Work-role attachment theory
2. Continuity theory
3. Life-course perspective
4. Disengagement theory
5. Activity theory
6. Crisis and negotiation theories

Practical application of retirement theories in modern contexts

Module 4: **Stages of the Retirement Transition**

1. Contemplation
2. Hesitation
3. Anticipation
4. Liberation
5. Re-orientation
6. Reconciliation

Focus: Emotional, psychological, and behavioural transitions across each stage

Module 5: Key Realities of Retirement

1. Psychological and emotional adjustments
2. Financial planning and investment strategies
3. Health, wellness, and nutrition
4. Managing change and uncertainty
5. Social relationships and support systems
6. Opportunities, benefits, and potential risks in retirement

Module 6: Practical Planning and Personal Strategy

1. -Developing a personalized retirement plan
2. -Lifestyle design and purpose discovery
3. -Post-retirement pathways (consulting, volunteering, entrepreneurship)
4. -Legacy building and mentorship opportunities

Module 7: Evaluation and Reflection

a. -Self-assessment tools and frameworks
b. -Retirement readiness evaluation
c. -Personal action planning and goal setting

KEY OUTCOME

Participants will leave the course with a clear, personalized, and actionable retirement plan, along with the mindset and tools needed to transition confidently into a fulfilling and purpose-driven next phase of life.

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