

Planning for a positive retirement workshop

PRE-RETIREMENT WORKSHOPS – 2018/2019

Forward planning is advisable when making any major changes and retirement is no exception. The East Riding Pension Fund (ERPF) works with Affinity Connect, one of the largest providers of retirement and redundancy services for the public sector, to offer you workshops which aim to help Local Government Pension Scheme (LGPS) members prepare for lifestyle and financial changes which take place at retirement, and to explore new opportunities that retirement brings. These workshops address a comprehensive range of important issues that you will need to consider and decisions that you will need to make before you retire and once you are in retirement.

We are pleased to announce that the current pre-retirement support programme has now been published.

Course date	Employer	Venue	Location	Time
30 January 2018	North East Lincolnshire Council	Doughy Learning Centre	Grimsby	1.00 – 4.15
13 February 2018	Hull City Council	Endeavour Learning & Skills Centre	Hull	9.30 – 3.30
20 February 2018	East Riding of Yorkshire Council	Leisure Centre	Beverley	1.00 – 4.15
12 March 2018	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15
17 May 2018	East Riding of Yorkshire Council	Leisure Centre	Beverley	1.00 – 4.15
7 June 2018	Hull City Council	Endeavour Learning & Skills Centre	Hull	9.30 – 3.30
6 June 2018	North East Lincolnshire Council	Doughy Learning Centre	Grimsby	1.00 – 4.15
11 June 2018	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15
8 August 2018	East Riding of Yorkshire Council	Leisure Centre	Beverley	1.00 – 4.15
6 September 2018	Hull City Council	Endeavour Learning & Skills Centre	Hull	9.30 – 3.30
9 October 2018	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15
27 November 2018	North East Lincolnshire Council	Doughy Learning Centre	Grimsby	1.00 – 4.15
29 November 2018	Hull City Council	Endeavour Learning & Skills Centre	Hull	9.30 – 3.30
16 January 2019	East Riding of Yorkshire Council	Leisure Centre	Beverley	1.00 – 4.15
12 February 2019	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15

BOOKINGS

Please find below a sample agenda and the dates currently booked for pre-retirement workshops. These workshops are free of charge and you can attend any venue listed. However you must seek approval from your employer/line manager before attending, and reserve a place. To do this please contact bookings@affinityconnect.org or call Affinity Connect on Freephone 0800 019 6076 (select extension 1 – training). Partners/spouses are welcome to join you free of charge.

If you are unable to attend the dates listed please contact Affinity Connect and it may be possible to offer alternative dates.

If you are booking on one of the courses hosted by Hull City Council please print off and complete the booking form and return it to: Endeavour Learning & Skills Centre, Learning & Development, 2nd Floor, Beverley Road, Hull. HU3 1UR or you can email this application to: learninganddevelopment@hullcc.gov.uk

Agenda	
<p>Managing Change Identifying delegate concerns Lifestyle, relationships, status, time, motivation</p> <p>Building a new life Using time effectively Volunteering, leisure & learning opportunities Further employment</p> <p>Maintaining health Mental, physical & social/emotional Holistic approach - practical steps Personal health action plan</p> <p>Income in retirement State pension & other state benefits/allowances Occupational pension benefits Choices and decisions at retirement Selecting appropriate levels of income & cash Personal taxation, & changes in retirement</p>	<p>Money Management Tax tips Budgeting - changes in income & expenditure Why you need income and capital Effects of inflation + life expectancy</p> <p>Investing in Retirement Banks, building societies, property, gilts, shares Understanding investment principles Managing and reducing investment risk Using cash to protect your investments Guaranteed investments</p> <p>Legal Issues & Estate Planning Why you need a professionally prepared Will Power of attorney – who controls your assets? Long term care – planning ahead Inheritance tax – planning ahead</p> <p>Thinking about the future Making a start - an action plan Professional advice – what to expect</p>
<p>Suitability: Anyone considering leaving employment on normal, early or ill health retirement, or considering flexible retirement. Partners are encouraged and welcome to attend (subject to your employers consent).</p>	
<p>Aim: To encourage a positive and realistic approach to a healthy and financially secure retirement</p>	
<p>Course objectives – you will have greater awareness of, and the tools to deal with,</p> <ul style="list-style-type: none"> • the decisions and steps that need to be taken at the point of leaving employment • the likely changes in lifestyle and your relationships, and how to manage them positively • the options for learning, leisure and voluntary opportunities • the practical steps and a personal action plan to maintaining health in retirement • personal taxation, changes at retirement + tips to ensure you don't pay too much • entitlement to state benefits and the impact on your occupational pension • impact of real inflation and increased longevity on your pension plans, and how to combat it • understanding investment principles and risk and how to manage/reduce it. • the financial implications of long term care • how a Power of Attorney and a Will can protect your assets for you and your beneficiaries • an opportunity to request independent financial advice (free, no obligation consultation)* 	
<p><small>*Disclaimer: Your employer cannot recommend any financial advisory organisation and is not responsible for any advice given. This service is provided by Affinity Financial Awareness a Top 100 IFA and one of the largest providers of Independent Financial Advice to public sector employees. Affinity Financial Awareness Limited is authorised & regulated by the Financial Services Authority. Registered Office: Farleigh Court, Old Weston Road, Flax Bourton, Bristol. BS48 1UR. Registered in England & Wales no 5246999.</small></p>	

Training Application Form

Please Print all Information

NAME OF COURSE (Only one course per application)			
DATE PREFERRED		ALTERNATIVE DATE	
PRE-REQUISITES ATTENDED:	Delete as appropriate		
	Yes	No	N/A
Name			
Telephone Number		Mobile	
Job Title			
Sector Classification	Delete as appropriate		
	Voluntary	Statutory	Private
			Other Please State
Work-base Name & Full Address (Including Postcode)			
E-Mail Address		Payroll/OfSTED/ Charity Number	
Ethnicity		Date of Birth:	Gender: Delete as appropriate Male Female
Special Requirements (Disability/Allergies/Basic skills etc)			
Line Manager's Approval (Signature)		Date	

Line Manager's Job Title			
Line Manager's Work-base Address			
Line Manager's Telephone Number		Line Manager's E-mail	
Applicant's Signature		Date	

We will use your information to provide appropriate training data when requested. By signing this application you agree to our sharing your information within the Local Authority.

All cancellations must be made in writing either by e-mail to learninganddevelopment@hullcc.gov.uk or by fax on (01482) 612442 For most courses there are waiting lists and we may be able to re-allocate you a place if given adequate advance notice.

Once completed, please return this form to:

Endeavour Learning & Skills Centre, Learning & Development, 2nd Floor, Beverley Road, Hull. HU3 1UR

Or you can email this application to: learninganddevelopment@hullcc.gov.uk

Or you can fax this application to: (01482) 612446