Planning for Personal Freedom

With

Patricia French

A New Way to Think About Retirement and the Future

Over the past twenty-five years, our ideas of retirement have undergone a radical change. Canadians planning retirement are now more likely to choose a more active lifestyle that incorporates continued interest in work, and a hands-on approach to the management of personal financial assets in a complex financial market place.

This two-day workshop is designed for participants who are age 45 and older and would like to evaluate their ability to maintain their lifestyle at a chosen retirement date.

Overview
The workshop will help participants to:

- identify and address any immediate issues with respect to a retirement plan
- provide a planning framework to help in planning long term goals
- provide specific information in the key areas of lifestyle, finance and estate planning.

Focus:
The workshop will focus on some of the following issues:

- Will you have enough income? How much is enough?
- The role of an employee pension and how does it fit with other pensions and income from savings?
- Can you maintain your lifestyle at retirement?
- With nearly fifty percent of Canadians invested in a market that is volatile, what are the implications of a financial plan?
- Legal and estate planning

How to recognize the priorities for decision making that may have a long-term impact on greater life satisfaction in retirement?

Facilitator: Patricia French is a Registered Retirement Consultant and has been practicing in the financial and retirement planning industry for over 15 years. She is an experienced facilitator and has taught workshops on retirement and financial planning, building credit and debt management. She is co-author of the book, *10 Things I Wish Someone Had Told Me Before I Retired*.