



THE RETIREMENT COUNSELLING SERVICE

2017 MIXED COMPANY

RETIREMENT PREPARATION SEMINARS

Apex House, Chiltern Avenue, Amersham, Bucks HP6 5AE

Tel: 01494 433553

Fax: 01494 724433

Email: Dwildey@call-rs.co.uk

web: www.the-retirement-site.co.uk

EXAMPLE PROGRAMME MIXED COMPANY RETIREMENT PREPARATION SEMINAR

Day 1

- 9.40am Meet fellow delegates over Tea or Coffee
- 10.00 **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?**
- National Insurance, what it buys and when you stop paying
 - How much and when will State pay a pension?
 - Options to increase your pension
 - Other benefits for you and your family
- 12.45pm **LUNCH** (with an opportunity for a private word with the Benefits Specialist)
- 2.00pm **UNDERSTANDING YOUR COMPANY OR PERSONAL PENSION**
- Your options
 - Previous pensions
- 2.45pm **Tea/Coffee**
- 3.05pm **HEALTH IN RETIREMENT**
- Positive health aspects
 - Keeping body and mind fit
 - The choices open to us
- 4.30pm **End of Day One**

Day 2

- 9.30am **REFLECTIONS ON DAY 1**
- 9.45am **PLANNING YOUR FUTURE**
- Moving home – pros and cons
 - Reorganising your home for retirement
 - Security – for yourself and your possessions
 - Income from your home? provision
 - Private Medical Insurance/long-term care
- 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 two-day 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.

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 two-days 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 and a participative approach is adopted so that the needs of each delegate are met.

The price of these non-executive open seminars is £430 per delegate £379 per partner This provides for the two day programme, overnight accommodation, all meals and a CD rom containing a pdf of our comprehensive information manual.

The Lake District seminar fee is £565 per delegate and £505 per partner . This includes 2 night's accommodation, programme, meals and a conducted tour of the picturesque Lakeland sights, plus CD rom.

In addition non-residential seminars are held in London, March and December . The fee of £340 per delegate £290 partner provides for the two day programme, lunches, refreshments plus CD rom. Overnight accommodation can be arranged if required.

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 courses please phone Shirley on 01494 433553 or email us on Dwildey@call-rs.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

2017

JANUARY

30-31 York

FEBRUARY

20-21 Executive, Cotswolds

MARCH

13-14 Stratford upon Avon
20-21 London (Non-residential)
27-28 Canterbury

APRIL

3-4 York
23-25 Lakes

MAY

8-9 Bath
21-23 Executive, York

JUNE

5-6 Stratford upon Avon
12-13 York

JULY

3-4 Canterbury
10-11 Bath
23-25 Lake District
31-1 Aug Executive, Cotswold:

2017

AUGUST

14-15 York
21-22 Stratford upon Avon

SEPTEMBER

3-5 Executive, York
11-12 Canterbury
24-26 Lake District

OCTOBER

16-17 Stratford upon Avon
30-31 Bath

NOVEMBER

20-21 Executive, Cotswolds
27-28 York

DECEMBER

4-5 London (non residential)

MIXED COMPANY HOTELS

Bradford on Avon, BATH



2017
8-9 MAY
10-11 JULY
30-31 OCTOBER

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.

LAKE DISTRICT (Grange-over-Sands)

2017
23-25 APRIL
23-25 JULY
24-26 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)

2017
20-21 MARCH
4-5 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.



STRATFORD UPON AVON

2017
13-14 MARCH
5-6 JUNE
21-22 AUGUST
16-17 OCTOBER

The Grosvenor Hotel is a delightful Grade II listed Georgian hotel ideally located in the historic market town of Stratford upon Avon. The Best Western Grosvenor prides itself on its courteous and efficient service in a relaxed and friendly atmosphere.
www.grosvenorhotelstratford.co.uk.



EXECUTIVE SEMINARS

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

HOWFIELD MANOR HOTEL CANTERBURY, KENT



2017

27-28 MARCH
3-4 JULY
11-12 SEPTEMBER

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 (formerly the chapel), serving a locally sourced French and English menu. Other amenities include the gardens, which feature a lake. www.howfieldcanterbury.co.uk/

YORK



2017
30-31 JANUARY
3-4 APRIL
12-13 JUNE
14-15 AUGUST
27-28 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



2017
20-21 FEBRUARY
31 JULY – 1 AUGUST
20-21 NOVEMBER

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

MOUNT ROYALE HOTEL, YORK



2017
21-23 MAY
3-5 SEPTEMBER

The family run Mount Royale Hotel where you can be assured of a friendly professional services in a country house hotel atmosphere, as well as an award winning breakfast. Each bedroom is individually furnished and the gardens have a 'Tardis' effect with a real 'secret garden feel' www.mountroyale.co.uk

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.