



# THE RETIREMENT COUNSELLING SERVICE

**2017/2018 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.

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 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 (2018 prices £440 per delegate £389 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. (2018 prices £580 per delegate and £530 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 (2018 prices £350 per delegate £300 partner) provides for the two day programme, lunches, refreshments plus CD rom.

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-rcs.co.uk](mailto:Dwildey@call-rcs.co.uk)

Book on the Web

If you prefer you can book places directly from [www.the-retirement-site.co.uk](http://www.the-retirement-site.co.uk)

## The Retirement Counselling Service SCHEDULE OF MIXED COMPANY RETIREMENT PREPARATION SEMINARS

### 2017

#### SEPTEMBER

11-12 Canterbury  
24-26 Lake District

#### OCTOBER

30-31 Bath

#### NOVEMBER

**20-21 Executive, Cotswolds**  
27-28 York  
29-30 York

#### DECEMBER

4-5 London (non residential)

### 2018

#### JANUARY

29-30 York

#### FEBRUARY

19-20 Canterbury

#### MARCH

12-13 Bath  
19-20 London (Non-residential)  
**26-27 Executive, Cotswolds**

#### APRIL

9-10 York  
22-24 Lakes

#### MAY

**20-22 Executive, York**

#### JUNE

4-5 Bath

#### JULY

2-3 Canterbury  
**16-17 Executive, Cotswolds**  
22-24 Lake District

#### AUGUST

13-14 York  
20-21 Bath

#### SEPTEMBER

16-18 Lake District

#### OCTOBER

8-9 Bath  
**29-30 Executive, Cotswolds**

## MIXED COMPANY HOTELS

### Bradford on Avon, BATH



**2017**

**30-31 OCTOBER**

**2018**

**12-13 MARCH  
4-5 JUNE  
20-21 AUGUST  
8-9 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](http://www.leighparkhotel.co.uk).

### LAKE DISTRICT (Grange-over-Sands)

**2017**

**24-26 SEPTEMBER**

**2018**

**22-24 APRIL  
22-24 JULY  
16-18 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](http://www.grange-hotel.co.uk) .



### LONDON UNION JACK CLUB (Non Residential)

**2017**

**4-5 DECEMBER**

**2018**

**19-20 MARCH**

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](http://www.ujclub.co.uk).



## EXECUTIVE SEMINARS

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



**2017**  
**20-21 NOVEMBER**

**2018**  
**26-27 MARCH**  
**16-17 JULY**  
**29-30 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](http://www.threewayshousehotel.com)

### MOUNT ROYALE HOTEL, YORK



**2018**  
**20-22 MAY**

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](http://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.

### HOWFIELD MANOR HOTEL CANTERBURY, KENT



**2017**  
**11-12 SEPTEMBER**

**2018**  
**19-20 FEBRUARY**  
**2-3 JULY**

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. .  
[www.howfieldcanterbury.co.uk/](http://www.howfieldcanterbury.co.uk/)

### YORK



**2017**  
**27-28 NOVEMBER**  
**29-30 NOVEMBER**

**2018**  
**29-30 JANUARY**  
**9-10 APRIL**  
**13-14 AUGUST**

A short walk from the City centre, the family run MountRoyale, 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](http://www.mountroyale.co.uk)