

BEYOND THE MONEY

HELP YOUR EMPLOYEES PREPARE FOR LIFE AFTER WORK

According to the Pew Research Center, every day for the next 19 years, about 10,000 Baby Boomers will turn 65. Your long-time employees have dedicated their careers to your organization. Now it is your turn to help them prepare for life after work. The current times call for a new model of pre-retirement planning that is holistic where the focus is on life beyond the money. Once people have the financial component figured out, *they are still concerned about LIFE after retirement.*

If we are what we do and we don't do it anymore, then who are we?

BEYOND THE MONEY is a series of workshops designed for employees approaching retirement, not for financial planning, but for LIFE after retirement. These workshops guide and build a plan to ensure the "rest of life can be the best of life." Designed for employees who are 50+ and who want to make the best use of their time, talents, treasures, and energy to live a life of meaning and significance.

How can you bring **BEYOND THE MONEY** to your organization? Start with the overview workshop and build a custom program designed for employees who are 50+. Let's talk and create a plan tailored for your company and its culture.

Why **BEYOND THE MONEY** is good for Organizations:

- Approaching retirement often causes a great deal of anxiety for employees which in turn decreases their quality of work and engagement.
- Anxiety causes stress that can affect emotional well-being and health and increases days lost to illness, absenteeism, health insurance claims, and overall morale.
- These workshops are an added benefit to current employees, prospective employees, and customers. They help you become an attractive place to work.
- Employee morale is improved when organizations demonstrate personal care by investing in their future.
- Research shows employees are more likely to accept an early retirement incentive package if they have a life plan. This improves the bottom line.

Why **BEYOND THE MONEY** is good for Employees:

- Research indicates people who attend pre-retirement workshops are more prepared for the transition from work to retirement and are happier with their lives after work.
- Employees leave confident, happy, and fulfilled because they created a life plan of future options.
- The retirement journey is purposeful because they feel more prepared for "what's next."
- They are less likely to "retire while on the job" because they have a plan.
- They leave with a deep appreciation for their careers and employer.

I spent my whole career thinking about our financial needs. Jann's workshop made me realize that the financial part is important, but it is only part of the puzzle. What I learned will benefit me in numerous ways as I plan the next phase of my life.

— Dr. Doug Soseman, DDS *Broadway Dental*

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Overview Workshop

This initial workshop covers the primary issues people face when they leave their career. These include:

- meaning and purpose
- the value of legacy and
- the numerous growth opportunities available beyond one's career.

Other Workshops

- Embracing Transition as Opportunity
- From Making a Living to Making a Life
- Creating a Vision for Your Future
- Developing a Portfolio Life
- Living a Legacy
- Becoming a Sage

Dr. Jann is an excellent resource for any **company executive looking to transition **their** “Baby Boomer” employees into retirement. As a 40-year veteran of the insurance industry, I believe her knowledge, passion, and empathy **would be** highly effective tools to motivate “Baby Boomer” insurance company employees to move forward into the next phase of their lives.**

— *Sandy Patrick, President Patrick and Associates, Inc.*



Jann Freed, Ph.D.

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About Dr. Jann (JannFreed.com)

Jann Freed, PhD, is a leadership development and change management consultant. She designs workshops and coaching to help organizations and individuals get from where they are to where they want to be and is affiliated with The Genysys Group (www.TheGenysysGroup.com).

Jann is the author of several books and her latest book *Leading with Wisdom: Sage Advice from 100 Experts* is based on more than 100 interviews with thought leaders in the field of leadership. Jann is certified as a Sage-ing Leader through Sage-ing International—an organization focused on helping people find meaning in the second half of life and she blogs on these topics. In fact, in 2017 Jann launched her podcast series called *Becoming a Sage*. In this monthly series, she interviews some of the top authorities in the various aspects of positive aging and living life on purpose and with meaning.