



Consulting and Training | Reach New Heights

Course Name

The Pre-Retirement Success Program

Sector Name

Management And Leadership

Document Type

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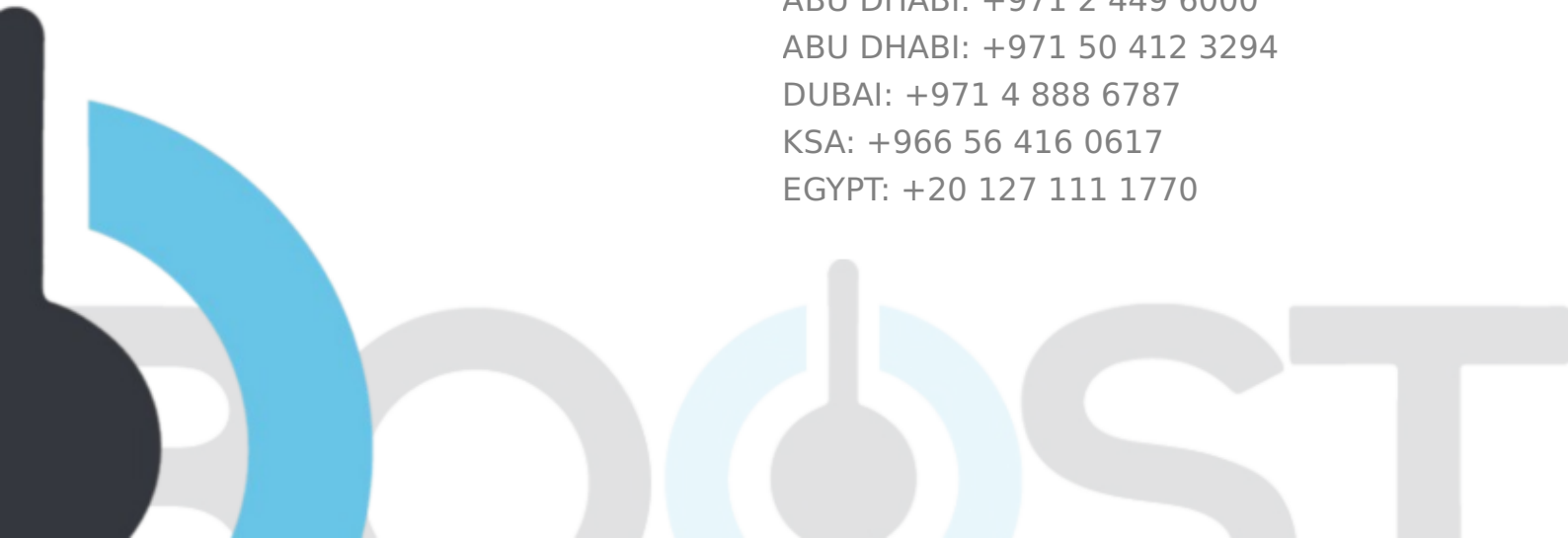
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The Pre-Retirement Success Program

Course Introduction

Retirement is one of the most important life transitions an individual can experience, marking a shift not only in career status, but also in personal identity, lifestyle structure, social engagement, and long-term financial planning. For long-serving employees in large and complex organizations, retirement represents more than a financial milestone—it is a psychological and social transformation that requires intentional preparation to ensure a confident, fulfilling, and well-balanced post-career chapter.

This Pre-Retirement Success Program is crafted as a public, original, and organization-agnostic learning experience that empowers professionals approaching retirement with the knowledge, tools, and mindset needed to navigate this transition smoothly and strategically.

Delivered by **BOOST Consulting & Training**, the program follows a holistic and highly practical approach, covering financial readiness, wellbeing, personal life planning, structured routines, community contribution, mentoring, board and committee participation awareness, executive-level meeting documentation, and long-term lifestyle sustainability.

Designed at an intermediate-to-advanced practitioner level, this program recognizes the depth of experience participants bring, and helps them transform that experience into meaningful life frameworks beyond full-time employment. The course emphasizes original content, real-world inspired planning techniques, structured discussions, action-based learning, guided reflection, and applied office and committee-level documentation practices, enabling participants to approach retirement not as a conclusion, but as a purposeful new phase of stability, personal development, and continued contribution within their organizations and communities.

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Target Audience

- ✓ Professionals across all sectors approaching retirement
- ✓ Senior professionals preparing for structured post-employment transition
- ✓ Long-tenured employees seeking guidance on life after formal employment
- ✓ Individuals expected to contribute to boards, executive councils, specialized committees, or mentoring roles post-career
- ✓ Anyone planning the next phase of their personal and professional journey beyond full-time employment

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Learning Objectives

- Understand the key dimensions of retirement transition (financial, personal, social, and psychological)
- Prepare for lifestyle and identity changes associated with retirement
- Develop a realistic and personalized retirement plan
- Strengthen financial awareness related to post-retirement needs
- Manage emotional and psychological aspects of career transition confidently
- Explore meaningful opportunities for continued learning, mentoring, volunteering, and structured contribution
- Understand how to document meetings, recommendations, and action points for boards and committees post-career
- Build a positive, structured, and future-focused outlook toward life after retirement
- Take informed steps toward a balanced and fulfilling post-career chapter

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The Pre-Retirement Success Program

Course Outline

✓ DAY 1

Understanding the Retirement Transition

- ✓ Retirement as a major life transition, not an ending
- ✓ Common emotional, social, and lifestyle challenges + emerging opportunities
- ✓ Redesigning personal identity beyond professional roles
- ✓ Psychological readiness and resilience during transitions
- ✓ Managing change, uncertainty, and expectations

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Course Outline

✓ DAY 2

Financial Awareness and Personal Budgeting for Retirement

- ✓ Understanding personal financial needs post-career
- ✓ Income source awareness (general overview, non-investment specific)
- ✓ Personal and household budgeting after retirement
- ✓ Sustainable lifestyle cost planning
- ✓ Avoiding common financial missteps
- ✓ Building confidence in financial decisions

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Course Outline

✓ DAY 3

Health, Wellbeing & Building Long-Term Life Balance

- ✓ Physical and mental wellbeing post-career
- ✓ Importance of structured routine and active living
- ✓ Stress management and emotional wellbeing
- ✓ Sustaining strong family and social relationships
- ✓ Designing long-term healthy lifestyle habits

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Course Outline

✓ DAY 4

Purpose, Mentoring, Committees, and Continued Contribution

- ✓ Finding personal purpose beyond full-time employment
- ✓ Leveraging expertise through mentoring, volunteering, and committee participation
- ✓ Understanding roles in boards, executive councils, and committees
- ✓ Documenting committee meetings, decisions, action points, and recommendations
 - ✓ Writing committee minutes
 - ✓ Structuring executive council minutes
 - ✓ Drafting board meeting minutes
 - ✓ Preparing summarized outcome minutes for leadership
 - ✓ Structuring committee recommendation reports (no analytics tools)
- ✓ Exploring passion areas, learning paths, and personal growth

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Course Outline

✓ DAY 5

Personal Retirement Action Plan & First-Year Roadmap

- ✓ Guided reflection on career legacy and personal achievements
- ✓ Defining personal goals for life after retirement
- ✓ Creating a structured 12-month retirement roadmap
- ✓ Managing the first retirement year effectively
- ✓ Tracking committee and board decisions, follow-ups, and recommendations
- ✓ Staying adaptable, motivated, and purpose-driven

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
March 15, 2027	March 19, 2027	5 days	4950.00 \$	Spain , Madrid
April 26, 2027	April 30, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
July 26, 2027	July 30, 2027	5 days	4250.00 \$	UAE , Dubai
Oct. 19, 2026	Oct. 23, 2026	5 days	4250.00 \$	UAE , Abu Dhabi

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