

Creating Your Holistic Retirement Plan

A Self-Paced Course

“Retire. Live. Thrive.”



**Plan with purpose, live with passion,
and thrive every day.**



EVERYTHING RETIREMENT
A LEARNING COMMUNITY

Why This Course Can Transform Your Retirement Planning

Because retirement is more than just financial planning—it's about creating a vibrant, purposeful, and fulfilling future.

With retirement potentially lasting 20 to 30 years beyond your professional life, employment, or job, it's vital to engage in holistic planning that considers your health, emotional well-being, and social connections.

Enroll in This Retirement Planning Course To

- Create a vibrant, purposeful, and fulfilling retirement life
- Prepare for a potential 20-30 years beyond your career
- Address all aspects of retirement: health, emotional well-being, and social connections
- Learn a 10-step strategy to design your ideal retirement
- Define what success, purpose, and fulfillment mean to you
- Explore flexible living options that suit your lifestyle
- Build strong social networks to support independence and connection
- Develop a personalized, adaptable retirement plan with confidence
- Live your retirement with growth, joy, and meaning

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Unlock the Four Pillars of Your Retirement Planning Journey

Part I Holistic Retirement Planning - 3 Modules

Redefining Retirement: Charting a Meaningful Next Chapter

Embark on Your Path to Retirement Planning

Creating Your Vision for Retirement

Part II Achieving Financial Security and Satisfaction in Retirement – 4 Modules

Saving For Retirement

Estate Planning and Financial Security Documents

Financial Satisfaction: Challenges and Strategies

Artful Planning: Developing Your Financial Plan

Part III Thriving in Retirement – 6 Modules

Anchoring Retirement in Purpose and Meaning

Cultivating Good Health for a Vibrant Retirement

Fostering Emotional Wellness in Retirement

Family, Friends, and Communities: Building Social Networks for a Rewarding Retirement

Retirement Living: Options for Every Lifestyle

Thriving in Retirement: Building Connections, Learning, and Living Fully for Retirees

Part IV Your Holistic Retirement Plan – 1 Module

Putting It All Together: Action Plan for Thriving in Retirement

Learning Objectives

What You Will Achieve

- Understand and respond effectively to societal trends and changes shaping retirement planning
- Master the holistic retirement planning framework that integrates health, financial, emotional, and social aspects
- Recognize the importance of diversity and inclusivity in creating impactful retirement strategies
- Emphasize the vital role of physical, mental, and social well-being in achieving a healthy, vibrant retirement
- Explore a variety of retirement living options and lifestyle choices to suit your vision
- Develop a personalized, flexible retirement plan that reflects your values, passions, and dreams

