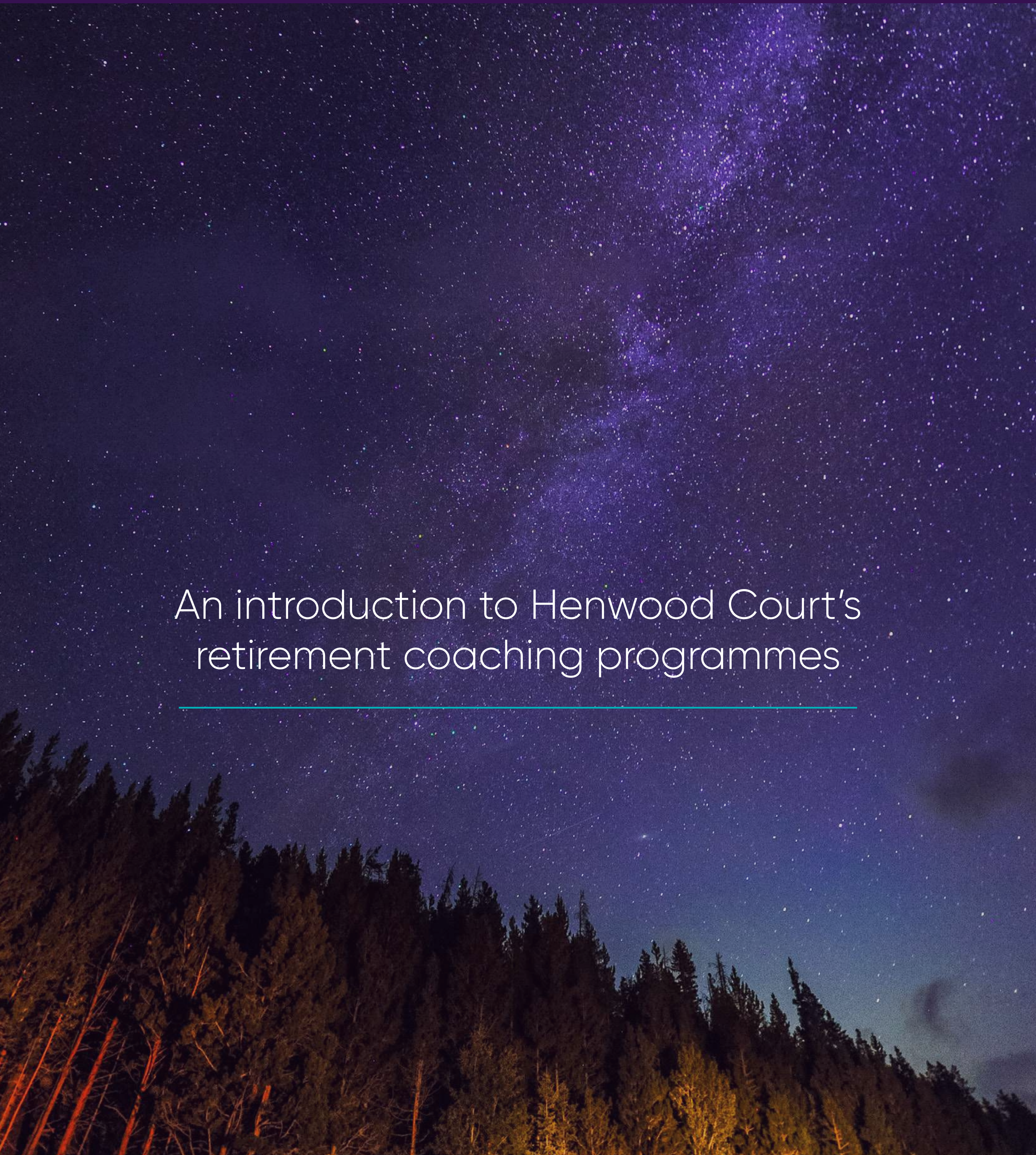
Henwood COURT

Creating your tomorrow

Financial Planners Chartered



An introduction to Henwood Court's retirement coaching programmes

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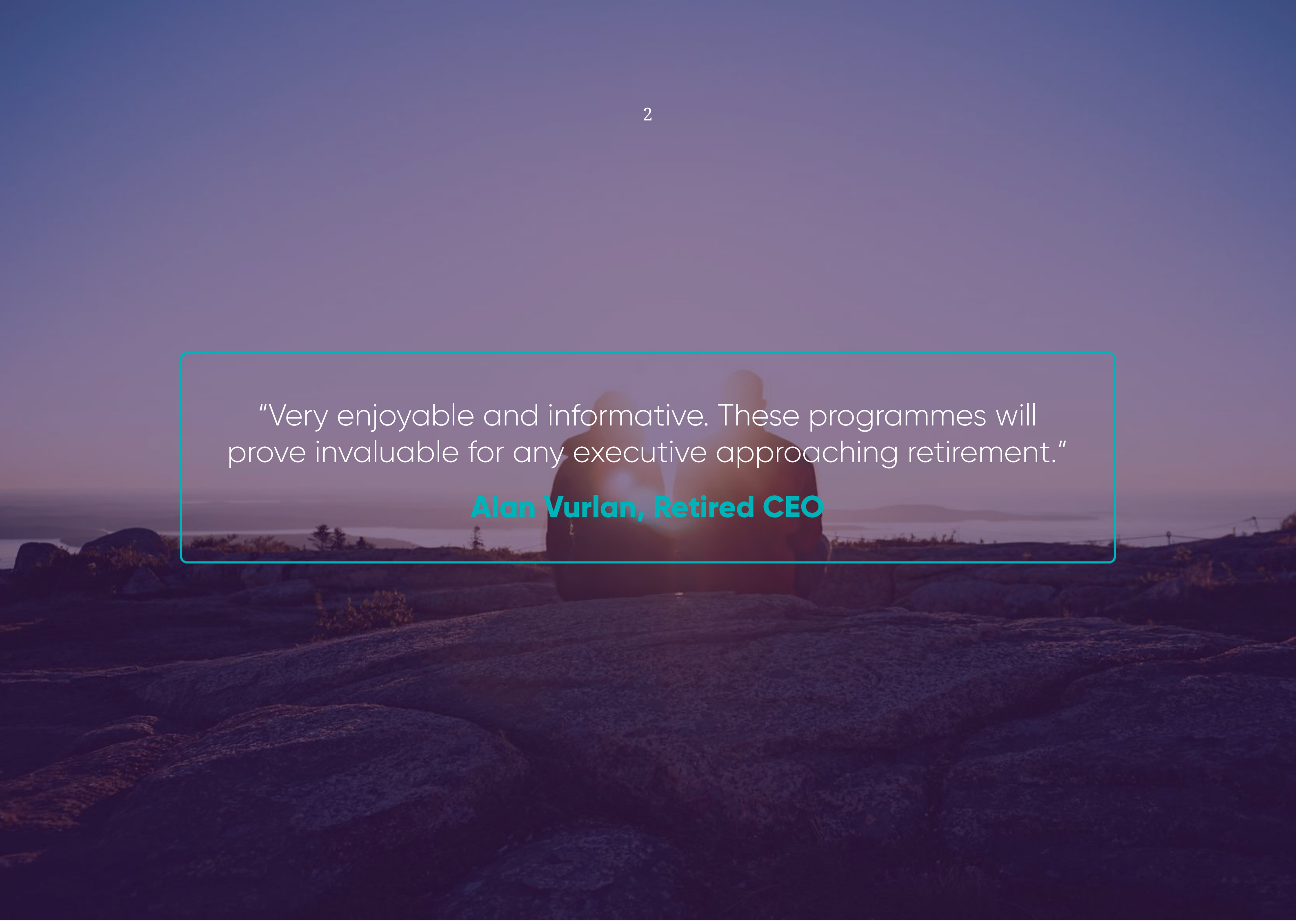


"Very enjoyable and informative. These programmes will prove invaluable for any executive approaching retirement."

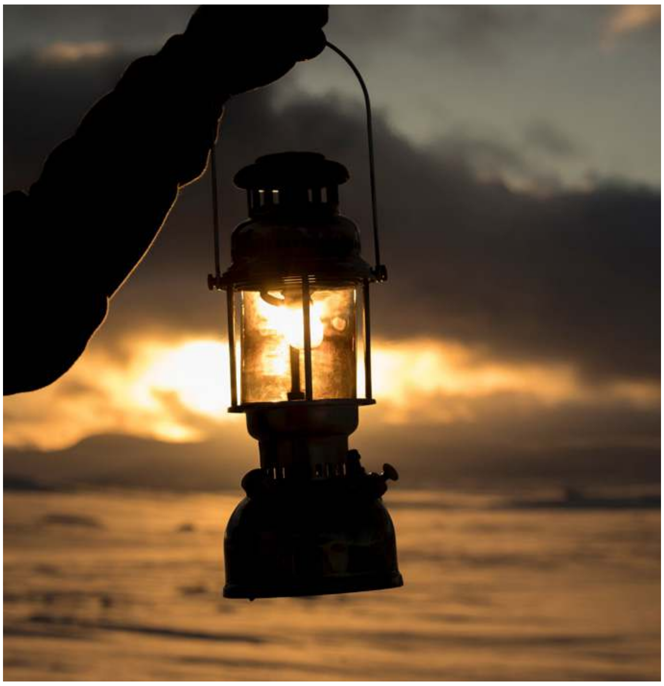
Alan Vurlan, Retired CEO

Retirement Coaching Programmes

If you would like extra help planning out your retirement, here are some options to consider.

Our retirement coaching programmes are designed to help you:

- prepare for retirement financially and emotionally
- take important pre-planning steps to ensure a smooth transit
- make the right decision for you (and your loved ones) with some exercises and strategies to work out what matters and what doesn't
- ensure all the necessary financial decisions are made in good time to secure your 'perfect day' future
- harness the power of proven and prudent strategies to maximise the benefit of your investments in retirement



There are two options; group retirement workshops and one-to-one retirement coaching sessions.

Option 1

The One-Day Executive Retirement Workshop (ERW)

This practical one-day workshop is designed to provide executives like you with a big-picture overview, fast. You will discover clear and useful insights into the retirement strategies you can use to become retirement ready. This greatly improves your chances of a successful transition from busy executive to contented retiree.

Before you attend, you will receive a free copy of our book "Retireability" which is an executive's guide to thriving in retirement. It is a quick, practical read which gives you time to ponder what you want from your retirement before you come along to the session. That way you can make the most of the opportunity, and not be scratching your head for answers on the day.

Getting Emotionally Ready for Retirement

The morning session teaches you how to be emotionally ready for retirement. You'll discover the mindset changes you need to consider to be emotionally prepared for retirement. You'll also get valuable insights into how to create the retirement lifestyle you desire so you enjoy a fulfilling retirement.

Getting Financially Ready for Retirement

The afternoon session delves into how to you can create a financial retirement plan that will support your desired retirement lifestyle. There's also time to consider the other big financial questions executives need to answer, often related to pensions, investments, tax, and multi-generational estate planning.

Option Two

One-to-One Executive Retirement Coaching Programmes

If you would rather have individual attention as you plan your retirement, there is a one-to-one coaching programme.

This 12-week programme takes place over a more relaxed pace where we will provide you with time out of your busy schedule and create some space for you to think about your, and where applicable your partner’s, retirement.

This will involve four meetings, two face-to-face meetings and two digital meetings and will include:

1. Discovery Meeting (face-to-face)

This is where we consider what is important to you, what your goals and objectives are, and to reflect on what a good life will look and feel like. We will also gather financial information for evaluation, and provide some life planning tools for you to consider and complete.

2. Sense Checking (Zoom)

During this session, we will clarify your life goals and what is important to you, while also sense checking some of the financial data we have collected so we can continue to build your financial plan. After this we will send you your written life sense plan for you to approve.

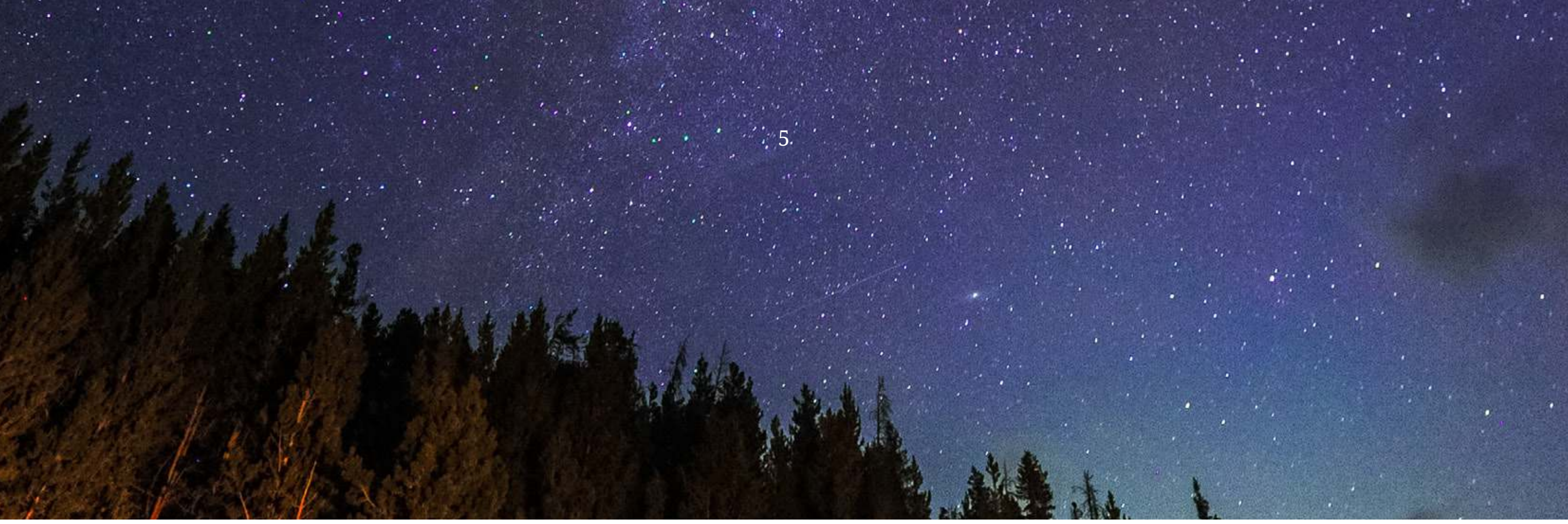
3. Strategy Meeting (face-to-face)

This is the fun session, where we will reveal your financial plan which will demonstrate if you have the financial means to live the life you want to live using sophisticated cash flow projections and, if not, financial strategies you will need to implement. Further, after comprehensively reviewing your financial information, we will provide commentary and identify any issues or opportunities in matters relating to tax, investment, pension, personal and family protection and estate planning, detailing financial strategies within a written financial life plan that will follow a few weeks after the Strategy Meeting.

4. Post-Planning Summary (Zoom)

Two weeks after receipt of your written financial plan, we will discuss your plan, answer any questions you may have, and agree an action plan to build on the work we have completed together. This includes, where possible, implementing any life changes and financial strategies.

The one-to-one programme is designed to lessen the impact of Retirement Shock and get you Retirement Ready.



About us

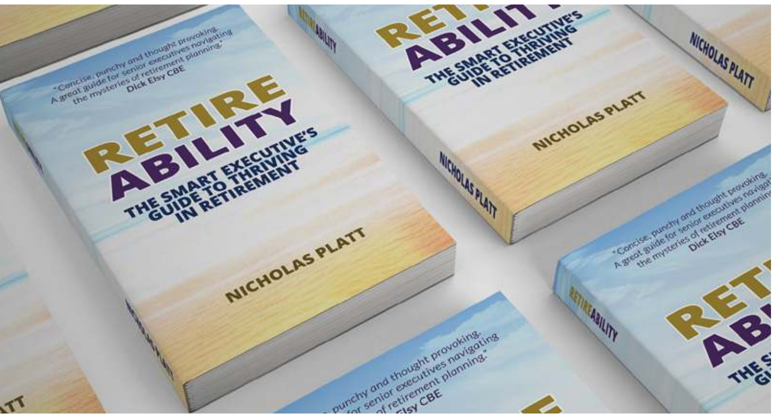
Henwood Court is a firm of lifestyle based Chartered Financial Planners focused on helping individuals and their families achieve their ambitions in life.

We have more than 20 years of personal, hands-on experience helping executives to transition from a busy work schedule into a happy, purposeful and financially independent retirement.

We provide transformational financial life planning advice that gives our clients the confidence to live the life they want to live.

We specialise in working with senior executives, business owners, and high earning professionals, helping them to enjoy their lifestyle both now and in the future.

This has given us a unique insight into the mindset of executives, and the mix of emotions both pre- and post-retirees experience. It's an experience that has allowed us to design our own successful coaching programmes, which combine lifestyle retirement advice with professional financial advice from a regulated and authorised firm of Chartered Financial Planners.



Much of what we have learned has been included in our Managing Director, Nick Platt's book "Retireability – The Smart Executive's Guide to Thriving in Retirement".

We have been recognised within the financial services profession as a leading retirement adviser, being strongly commended as a retirement adviser at both the Moneyfacts Awards and Money Marketing Awards in 2019.

We hope you find this information useful.

We'd be delighted to help

"create your tomorrow."

Please get in touch to arrange an initial discussion about our group, or one-to-one retirement workshops.

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