**Virtual pre-retirement course outline (2-day course)**
**National Association of Federal Retirees and its partners: Tradex, GERAS Centre for Aging Research, Melody Walz, Certified Pension Presenter, Ottawa branch member & pensioner**

| Time | Module | Topics | |
|---|---|---|---|
| **Day 1** | | | |
| **9:00** | Introduction | Welcome | **Anthony Pizzino**, CEO, Federal Retirees<br>**Josée Patry**, Moderator, Learning and Development Officer, Federal Retirees |
| **9:10** | The Benefits of Planning | Course Outline<br><br>Tales from the Other Side – Retirement Transition Survey | **Gail Curran**, Volunteer and Engagement Officer<br>Federal Retirees |
| **9:30** | Your Public Service Pension Plan Member Education Session | Pension & Benefits Website<br>Pension Plan Contributions<br>Benefit Calculation<br>Benefit Options | **Melody Walz**, Certified Pension Presenter |
| **10:30** | **Break (15 minutes)** | | |
| **10:45** | Your Public Service Pension Plan Member Education Session (continued) | Benefit Options (Continued)<br>Deductions<br>Indexing | **Melody Walz**, Certified Pension Presenter |
| **12:00** | **Meal Break (30 minutes)** | | |
| **12:30** | Your Public Service Pension Plan Member Education Session (continued) | Supplementary Death Benefit<br>Survivor Benefits<br>Group Insurance Benefits<br>Leave Without Pay<br>Service Buyback | **Melody Walz**, Certified Pension Presenter |
| **14:00** | **Break (15 minutes)** | | |
| **14:15** | Living Your Best Life – Part 1 | Working Post-Retirement<br>Volunteering<br>Relationships<br>Living arrangements | **Gail Curran**, Volunteer and Engagement Officer, Federal Retirees |
| **14:45** | Living Your Best Life – Part 2 | Health and wellness in retirement | **Dr. Patricia Hewston**, Research Associate, Medicine Assistant Clinical Professor (Adjunct), Rehabilitation Science, GERAS Centre for Aging Research, McMaster University<br>**Ashlee Azizudin,** Research Assistant |
| **15:30** | Closing Remarks | Wrap up | All |

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|---|---|---|---|
| **Day 2** | | | |
| **9:00** | Financial Planning | Module 1 – CPP | **Tradex Team** |
| **9:30** | Financial Planning (continued) | Module 2 – OAS<br><br>Module 3 – Income from personal savings and assets (RRSP, TFSA) | |
| **10:30** | **Break (15 minutes)** | | |
| **10:45** | Financial Planning (continued) | Module 4 – Financial concepts (markets, income tax, investment strategies) | **Tradex Team** |
| **12:00** | **Meal Break (30 minutes)** | | |
| **12:30** | Putting it All Together | Module 5 – Putting it all together (checklists, retire income forecast)<br><br>You and Your Survivor | **Tradex Team** |
| **13:00** | Estate Planning | The Importance of an Estate Plan<br><br>Wills<br>Beneficiaries<br>Probate<br>Power of Attorney<br>Personal Directives<br>Insurance<br>Funeral Arrangements<br>Digital Assets | **Tradex Team** |
| **14:00** | **Break (15 minutes)** | | |
| **14:15** | Staying Connected with Federal Retirees | Advocacy Work<br>Services<br>Partnerships | **Sylvain Ouellet, Client Services**, National Association of Federal Retirees |
| **14:45** | Retirement Experience | Personal experience of a former public servant | **Branch volunteer and pensioner** |
| **15:30** | Closing Remarks | Wrap up<br>Presentations & Evaluation form | All |