

# RETIREMENT experience™

## PLANNING MEANS TAKING CONTROL

Give those you serve the tools and knowledge to secure their future.

**95%** of the workforce believes it is helpful to receive financial education, advice or counseling to successfully manage their retirement income and investments.<sup>1</sup>

“ The literature suggests that frequent educational events, particularly seminars, with consistent messages produce the largest effects on retirement savings.<sup>2</sup> ”

## Introducing **BALANCED Life™ Retirement Experience**

Cornerstone Credit Union Foundation and BALANCE believe that financial empowerment through education is foundational to reducing stress and improving quality of life.

**BALANCED Life™ Retirement Experience** is a guided learning experience centered on an **interactive workshop spanning 60-90 minutes**, illuminating the path forward as participants move closer to retirement. Whether the trail is 50 years long or 5, this program is designed for information retention, implementation and ongoing maintenance.

Presented through a partnership between **Cornerstone Credit Union Foundation** and **BALANCE**



<sup>1</sup> Goldman Sachs Asset Management Retirement Survey & Insights Report 2022. <sup>2</sup> Social Security Administration.

Flexible enough to keep both online and in-person audiences engaged, the presentation features several activities to enliven what can sometimes be an intimidating topic. With relatable scenarios for any age, built-in discussion-starter activities, helpful Empathy Maps, and a comprehensive and easy-to-use workbook to keep the momentum going, this suite of carefully crafted tools will seize the attention of any audience looking to secure their future.

## Build lasting bonds in your community

Often, people feel they don't know where to turn to get unbiased guidance as they plan for their golden years. By offering Retirement Experience to those hungry for this knowledge, you not only fill those key knowledge gaps, you establish your organization as a beacon for the kind of financial empowerment that truly gets people and their needs.

### Benefits

- ✓ Easy to present, fun for attendees
- ✓ Business development opportunities abound
- ✓ Appeals to everyone from young adults to seniors
- ✓ Great for in-person or online audiences of any size
- ✓ Activities and interactions keep participants focused
- ✓ Builds a relationship of trust by addressing emotional side of retirement
- ✓ Audience leaves with a strong plan of action



### What you get

- ✓ A branded PowerPoint deck
- ✓ Branded presentation materials, included retirement scenarios and Empathy Maps for all age groups
- ✓ A branded take-home workbook for attendees
- ✓ Facilitator's guide
- ✓ Marketing kit

**Pricing: \$2,000**

*For more information or to schedule a demo, please contact Partner Relations at (800) 808-4327 or [partner-relations@balancepro.org](mailto:partner-relations@balancepro.org).*