

Preparing for Retirement - Beyond the Financial Plan



After investing decades of your life in a career, retirement should be about enjoying the fruits of your labour. However, the transition from the workforce requires careful consideration, and the decisions you make now can have enormous implications on your post-career lifestyle.

At Providence we recognise it's not only about your finances. We are also here to help plan the non-financial aspects of your life after work.

Supported by market-leading strategic tools and an experienced retirement coach, we are here to guide you towards an enjoyable and fulfilling retirement.

Preparing for Retirement

Our primary goal is to help you re-imagine what retirement means. We look beyond your bank balance and focus on assessing your life balance, now and in the foreseeable future.

Your financial health is fundamental to retirement but recognising the non-financial aspects is equally as important. It may be a slight tweak of your expectations or a complete recalibration of your personal aspirations and life goals. For us, it's about redefining and bringing clarity to your journey.

After assessment via an online tool is complete, we identify your individual strengths and the areas on which you may need to focus. We may also examine your attitude towards retirement and whether you have emotionally distanced yourself from work. These are just some examples of the many areas we evaluate in order to come to a true understanding of your needs.



Our aim is to make a difference in your life – to provide you with exceptional, all-encompassing non-financial retirement planning delivered by highly professional and experienced retirement coaches.

The Approach

Life after work has multiple aspects above and beyond your finances including:

- Will you miss working?
- Do you look forward to the change retirement will bring for you?
- How readily will you adapt to change?
- Have you identified new opportunities for yourself in retirement?
- Do you foresee any changes to your relationships in retirement?

Your retirement coach will tailor a program to suit your needs, including the following components:

1. Online Tools

The program usually commences with the completion of two online tools - "Retirement Success Analysis" and "Business DNA".

2. Personal Retirement Report

From these comprehensive questionnaires your retirement coach will deliver a personal retirement report identifying strengths and focus areas including personalised recommendations to further prepare for retirement.

3. In-Depth Consultations

You will have at least one in-depth one-on-one consultation (2 hours) to explore areas identified as crucial to a successful retirement. Further in-depth consultations are available depending on your areas of focus and readiness for retirement. One or more of these consultations may also include your partner.

4. Resources and Support

Your coach will provide you with resource materials to enable your continued focus on retirement transitioning and will be available by email and telephone before, during and after all consultations.



DIANA MILLS

Diana is a Certified Retirement Coach and has a Bachelor of Arts and a Bachelor of Laws from the University of Sydney.

As a retirement coach Diana specialises in working with her clients to identify, plan and create their ideal retirement.

Diana worked as a lawyer in Sydney, London and Hong Kong before establishing a legal recruitment business. For 10 years, she helped people with the challenges of changing jobs and careers – matching their aspirations and skills with the right culture and role. Diana is the founder of Rethink Retirement.

Safe Passage

For a confidential discussion about preparing for retirement please contact Grant Patterson or Michael Ogg (Sydney) or James Smith (Melbourne).



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