



# How to plan for retirement from home

Proper retirement planning will always be important, regardless of what's happening in the world around us. Right now, we're all adapting to a new normal. As experienced retirement planning providers, we recognise that unprecedented external or even personal circumstances may prevent people from receiving the assistance they need — whether workshops with peers or one-to-one meetings with a professional who can talk through personal questions.

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## Don't worry – we're still here for you

Drawing on our leading digital capability and a wealth of experience, MMB's Workplace Education Team has developed **Retirement Planning at Home**, a suite of distance learning resources to help you plan for a successful retirement.

The full **Retirement Planning at Home** programme comprises:

- **A 12-month unlimited-access licence for our comprehensive e-learning course, Planning for Retirement Online**  
The e-learning content is designed to replicate the full curriculum of our two-day Lifestyle and Detailed Finance workshops and contains more than 20 hours of narrated content, interactive tools and exercises.
- **Our highly regarded course pack, which supports the content of our face-to-face workshops and provides a handy bookshelf reference**  
The course pack includes offline information and reference materials as well as the course lessons and resources to help people create their own retirement action plans.
- **A 30-minute Retirement Planning Essentials video**  
The video takes you through the essentials of retirement planning and explains how to make the most of the resources available in the full programme.
- **Two 45-minute one-to-one calls with our experienced trainers**  
These are available as a choice of two calls on either retirement lifestyle or retirement finance, or one of each — whichever you need to meet your particular needs.

## In addition, we've developed the following materials to help clients currently facing similar situations:

### 1. **Employer financial wellbeing resources**

### 2. **Financial Wellbeing Employee Toolkit**

If you have any questions or need help deciding what level is right for you, please get in touch with [LaterLife@MercerMarshBenefits.com](mailto:LaterLife@MercerMarshBenefits.com) or telephone 0333 220 4164.

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## The programme is available in three levels:

- **LEVEL ONE: Full package at £200 + VAT**
  - All components as detailed
- **LEVEL TWO: Digital-free, Call-based at £150 + VAT**
  - Two 45-minute one-to-one calls as detailed
  - Course pack
- **LEVEL THREE: Basic package package at £100 + VAT**
  - 12-month unlimited-access e-learning licence
  - Course pack
  - Retirement Planning Essentials video