

BEYOND THE MONEY

HELP YOUR ORGANIZATION AND BOOMERS BETTER PREPARE FOR "BEYOND RETIREMENT."

If we are what we do and we don't do it anymore, then who are we?

Beyond the Money (BTM) is a series of coaching cohorts which help employees nearing retirement prepare for a fulfilling life after their formal career in the workplace. While BTM has many benefits for individual employees, it also directly benefits your entire company by extending and enhancing productivity of those nearing retirement, decreases costs, and assists with critical retirement transitions and transfer of knowledge – all which reflect positively on your brand and workplace.



BENEFITS FOR YOUR ORGANIZATION:

- Approaching retirement often causes anxiety for employees which can decrease their productivity and engagement; BTM extends and enhances productivity by giving employees a road map for life after their formal career. Stress affects emotional well-being and increases costs to the organization in absenteeism, health insurance claims, and decreased morale: BTM decreases stress while increasing morale, thereby decreasing your costs.
- Most companies do not consider the lives of their employees post-retirement; by investing in BTM, you are investing in your employees' futures and current employee satisfaction increases long-term.
- Knowledge is often lost when people retire and that translates into expensive retraining and sometimes unwanted culture shifts; BTM prevents the loss of valuable knowledge by valuing and leveraging your employees' wisdom, experience and institutional knowledge.



BENEFITS FOR EMPLOYEES:

- Research indicates people who attend pre-retirement presentations are more prepared for the transition from work to retirement.
- They are less likely to "retire while on the job" because they have a plan.
- Employees leave confident, happy, and fulfilled because they understand their options and the possibilities. They leave with a deep appreciation for their careers and employer – and that reflects positively on your culture and your brand while encouraging knowledge transfer with employees who remain.

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Bring **BEYOND THE MONEY** to your organization with a two-hour overview coaching cohort and build a custom program designed for employees approaching retirement.

OVERVIEW COACHING COHORT:

This session covers the primary issues employees face when leaving their careers.

- meaning and purpose
- value of legacy
- growth opportunities

INVESTMENT:

- The investment in BTM is based on the number of participants, the number of cohort sessions, and your organizational goals. Through collaboration, we determine how best to accomplish your goals. BTM is affordable and your employees will thank you.

As a 40-year veteran of the insurance industry, I believe Dr. Jann's knowledge, passion, and empathy are highly effective tools to motivate "baby boomer" insurance company employees to move forward into the next phase of their lives.

— Sandy Patrick, President Patrick and Associates, Inc.



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About Dr. Jann (JannFreed.com)

Jann Freed, PhD, is a leadership development and change management consultant. She is the author of *Leading with Wisdom: Sage Advice from 100 Experts* and has a monthly podcast series called *Becoming a Sage* where she interviews thought leaders about living life on purpose and with meaning.