

Age at Work

Case Study



MID-CAREER REVIEW | FINANCE

Catherine attended our Finance webinar in August 2023 because she felt she needed to get her affairs in order which included understanding her pension and writing her will. She also wanted to help her husband get on top of his finances too.

About Catherine

She would like to retire prior to the state pension age of 67 but wanted to understand what income she would need and to start planning for that next chapter of her life.

What Catherine did

Catherine said, "I felt the workshops were extremely useful and a reality check. I had a bad experience where my mum had to watch every penny once she retired. I don't want to be in the same position."

She commented that she often works beyond her contracted hours and had been putting off looking after herself physically and mentally. As she would like to retire before the state pension age, she realised she needed to start making more effort looking after herself so she will be healthier to enjoy

her later life. As a result, she made an appointment with her practice nurse as a first action.

Because of the information she received both during and after the webinar, she felt more informed and confident in knowing where to find more guidance and support regarding her pension and future planning.

Two key actions she took away from the webinar were to write her will and to organise a lasting power of attorney, with a deadline to do this by the end of the year.

"I WOULD MOST DEFINITELY RECOMMEND THE WEBINAR TO ANYONE WHO WORKS AND WANTS TO FEEL BETTER INFORMED AND EMPOWERED TO TAKE ACTION FOR RETIREMENT AND THE FUTURE. IT'S A REAL EYE OPENER TO SEE HOW CLOSE WE ARE TO RETIREMENT AND HOW IMPORTANT IT IS TO TAKE ACTION NOW." Catherine, Mid-Career Review participant



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Love later life

