

Age at Work

Case Study



MID-CAREER REVIEW – FINANCE AND CAREER, HEALTH & WELLBEING

John's employer promoted Mid-Career Review webinars and he saw them as a learning opportunity. He wanted to find out more about pensions and where he could find reliable information.

About John

John has worked for different employers over his lifetime and has five different pensions, some are defined benefit and some are defined contribution pensions. He would like to retire before his state pension age of 67 and wanted to know whether this was possible.

He had been thinking about his pensions and early retirement for a while but wasn't taking action since he wasn't sure how to get started or what to do. He didn't know the total value of his pensions nor how much he needed for the lifestyle he envisaged.

What John did

John attended our finance webinar in early 2023 and in July 2023 attended our Career, Health & Wellbeing webinars.

He noted that, "The Mid-Career Review webinar really helped me to focus the mind and take action to work out how much I need to retire and how much my pensions would provide.

It provided some excellent support and guidance and kickstarted me to think more seriously about planning for my retirement."

He created a spreadsheet listing his different pensions, their worth, when he can access them etc. This information would help him understand whether he would have enough income for retirement.

The webinar also shared valuable information about retirement living standards, to help him consider what retirement lifestyle he would like and how much he would need to finance that lifestyle.

**"THE WEBINAR WAS VERY
USEFUL AND PRESENTED IN A
CLEAR AND CONCISE WAY. I
DEFINITELY BENEFITTED AND
I HAVE ENCOURAGED OTHER
COLLEAGUES TO REGISTER
FOR FUTURE WEBINARS AS
WELL"** John Evans

John also used information in the Resource Directory provided, which gave him confidence on where to go to access further information and impartial guidance. The directory signposted him to impartial information on saving money and wider money topics.

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John attended the Career, Health & Wellbeing webinar. He found the Career section useful to help him consider what he wants from his career in the next 5 – 10 years, to provide satisfaction in work.

He said he found the action planner very useful to help him map out his next 5 – 10 years and to consider his skills and values.