

“YOUR RETIREMENT, YOUR WAY”

Reunion Presentations and Seminars for College and University Graduates 45 to 65+ Years Old

OVERVIEW

As older alumni approach retirement, they again face many of the same life-defining questions they faced when they were in college: what do I want to do with my life, and how do I make it happen? A professionally-guided seminar on retirement planning is a highly relevant topic for this group. Your Retirement, Your Way Seminars offer a guided, thoughtful and intelligent forum on retirement planning which easily integrates into the reunion experience. The topic’s attraction, appropriately promoted, can help increase reunion attendance.

“YOUR RETIREMENT, YOUR WAY” retirement planning seminars, based on the top-selling book of the same name, have been held at major colleges and universities around the country, most recently at Stanford University and Dartmouth College. They are offered for both college and advanced degree graduates, and are targeted to alumni from 45 to 65+ years old. Similar seminars have also been offered at major conferences (i.e. The American Society on Aging). Due to the relevance of the subject matter, the professionalism of the presenters, and the participatory format, alumni feedback has been very positive.

Our presentations and seminars encourage exploration of the options and possibilities which the later stages of life can offer. They are thought-provoking and interactive, enabling alumni to reconnect with each other on a deep, personal level. And by offering this experience of intensive self-exploration and renewal, your college or university can again prove itself a vital resource, helping to strengthen the bond between the school and its older graduates.

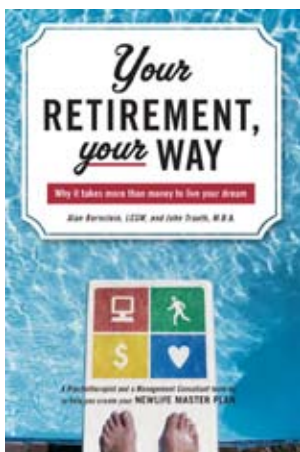
PROCESS AND CONTENT

Both the presentations and seminars are based on the “Your Retirement, Your Way” method, which incorporates the psychological, strategic and financial aspects of this major life transition. These are the key drivers for creating a satisfying, fully-engaged retirement.

The topics covered include:

- The five major “myths” which distort realistic perceptions about retirement, and how to keep yourself from falling into these traps.
- Preparing psychologically for change.
- Analyzing your personality to determine the lifestyle which will make you satisfied and fulfilled.
- Creating your “NewLife Vision” based on that lifestyle and developing the personal strategy to make that vision a reality.
- Sharing and validating your retirement plans with those closest to you.
- Reorganizing your finances to support your new retirement lifestyle while ensuring that your money will last for the rest of your life.
- Managing your life after retirement toward happiness and fulfillment.

Surveys have shown that 40% of retirees are unhappy with their life in retirement. The goal of these seminars is to help attendees custom-tailor a retirement lifestyle that will make them satisfied and fulfilled.



Alan Bernstein, LCSW
John Trauth, MBA

SEMINAR LEADERS



Alan Bernstein, LCSW

ALAN BERNSTEIN is a psychotherapist and career counselor. His previous book, *Guide To Your Career,*" (Random House/Princeton Review) is now a classic in its 6th edition. Alan encourages participants to discover and utilize their underlying motivations, interests and style needs in their retirement planning through interactive participatory exercises.



John Trauth, MBA

JOHN TRAUTH is a strategic and financial planner. John demonstrates how to incorporate the psychological dimensions gained through the initial exercises into a personal strategic plan for creating a meaningful and fulfilling retirement, including the financial strategy for supporting the new lifestyle.

THREE FORMATS ARE OFFERED:

1. A one-hour "keynote" presentation followed by Q&A.
2. A three-hour seminar (the most popular format), generally offered on Saturday morning of a reunion weekend, which includes both presentation and interactive involvement by alumni in creating their "NewLife Vision."
3. A six-hour format (the most intensive format), generally offered the day before the formal reunion weekend, allowing participants to become actively involved in most aspects of planning their future retirement life.

These presentations and seminars are offered by John Trauth and Alan Bernstein, co-authors of *"Your Retirement, Your Way: Why It Takes More Than Money To Live Your Dream"* (McGraw-Hill, 2007). The one-hour presentation format is given by either Alan or John, and both are actively involved in the seminars. A copy of the book is provided to each seminar participant. In the "Keynote" format, purchase of the book is optional.

For more information on the book and the authors, please visit www.yourretirementyourway.com.

BOOKING

For information on costs and to book a keynote or seminar for your alumni reunion, please contact Five Star Speakers and Trainers at 8685 West 96th Street, Overland Park, Kansas 66212: (913) 648-6480: or you may contact John or Alan directly:

- **John Trauth**
14 Toyon Court, Sausalito, California • 415-332-4346 • John@YRYW.org
- **Alan Bernstein**
122 East 82nd Street, New York, New York • 212-288-4881 • Alan@YRYW.org
- Or email: Info@yourretirementyourway.com

"Thanks to you and Alan for a great morning. The feedback has been very supportive. People particularly liked the visioning exercises and want to offer programs like yours at all our Class of '72 reunions."

Andy Danver, Stanford MBA – Class of 1972

"Having turned 60 recently, I was extremely fortunate to attend the one-day seminar conducted by John Trauth & Alan Bernstein during the 35th reunion of my MBA class. The combination of psychologically knowing oneself (what we like doing, what we do well, & what we don't like doing) with a pragmatic strategic planning approach helps put structure & focus on what could be a too unstructured and messy part of life."

Jean Rozwadowski, Dartmouth (Tuck) MBA – Class of 1973

"I enjoyed your seminar immensely and I am incorporating these thoughts into my information bank, communicating them with my family and I am implementing some principles now to enjoy life. Thanks again for sharing your pearls of wisdom with me."

Margaret Waszkiewicz MS RN CRRN CNA, Rush University Medical Center

Book/Alumni Reunions/Other Testimonials

The "Your Retirement, Your Way" method is offered in conjunction with the Birkman Personality Profile, a sophisticated instrument used by Fortune 500 and other major corporations. The Birkman Method was initially developed with support from the National Science Foundation.

