

PHASE™ into Retirement

An Advisor Workshop on the Non-Financial Side of Retirement Readiness

Most advisors are well-prepared to manage the financial mechanics of retirement. What's harder, and increasingly part of the job, is navigating the life transition that accompanies it.

Clients approaching retirement often struggle with questions that don't show up in projections: loss of identity, lack of structure, uncertainty about daily life, health, purpose, and connection. When these issues remain unaddressed, confidence wavers and planning conversations stall.

PHASE Into Retirement™ introduces advisors to a practical framework for understanding and discussing those non-financial dynamics.

PHASE™ examines five interconnected dimensions that shape the lived experience of retirement: **Purpose, Health, Activities, Social Life, and Everyday Life.**

The workshop explains how these elements interact, why gaps in one area often appear as hesitation or anxiety in planning discussions, and how advisors can use this perspective to guide more productive conversations.

As part of the workshop, advisors are given the opportunity to interact directly with the PHASE™ assessment. This hands-on exposure allows advisors to experience how the framework is translated into structured questions, scoring, and insight, providing practical context for how PHASE™ can support client conversations.

This is not therapy, coaching, or role play. It is a professional, research-informed tool designed to complement existing planning processes.

Advisors leave with:

- A clearer lens for interpreting non-financial readiness
- Language clients can relate to but rarely initiate
- A structured way to connect life considerations to financial planning
- Greater confidence addressing the human side of retirement transitions

PHASE™ Into Retirement helps advisors better understand what shapes retirement outcomes beyond the balance sheet - and how to bring those insights into everyday planning conversations.

When advisors can address both sides of readiness, discussions tend to move forward with greater clarity and confidence, clients feel truly understood, and loyalty follows.



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