

“Managing Retirement Income Workshop”
 Participant Workshop Evaluation Summary
 Elm Grove, WI

<u>Excellent</u>	<u>Good</u>	<u>Average</u>	<u>Poor</u>	<u>Unacceptable</u>
5	4	3	2	1

1. Overall, how would you rate the quality of the workshop?

4.2



Comments:

- We really needed more info on how a pension fund works as far as work hours, lay offs, insurance, etc.
- First time workshop
- Extremely informative
- A great presentation
- Interesting, fast moving

2. How valuable was the workshop for you?

5

4

3

2

1

4.1



Comments:

- Am still “young” (54) enough to make some positive financial decisions that I will benefit from when I do retire.
- Made me think about how unprepared I am.
- Learned a lot.
- Nice to see all these variables
- Gave me things to work on that I hadn’t been aware of.

3. How do you rate the instructor’s presentation?

5

4

3

2

1

4.6



Comments:

- Excellent – good speaker, knowledgeable, held attention
- Presented in an understandable way.
- Never paused and kept interest high – above average diction, voice, all categories covered.
- Well prepared, great handout

- 4. Which of the following actions do you intend to take as a result of this program?**
- | | |
|--|-----|
| Increase retirement savings outside of work | 30% |
| Increase retirement savings at work | 11% |
| Better diversify retirement savings | 23% |
| Create a retirement income management plan | 84% |
| Explore/consider working in retirement | 16% |
| Explore adding lifetime income | 20% |
| Better understand my Social Security benefits and when to start them | 46% |
| Begin a debt reduction program | 10% |
| Create a retirement spending plan | 41% |
| Seek an advisor who can help with my income plan | 30% |
| Begin planning what to retire to (mo. of Saturdays) | 30% |
| Retire as planned with no changes | 0% |
| Evaluate and minimize retirement risks | 23% |
| Other: (please describe) | 0% |
- 5. How helpful were the risk calculators in demonstrating retirement risks?**
- | | |
|---------------------|-----|
| Very Helpful | 28% |
| Helpful | 64% |
| Not helpful | 3% |
| Don't remember them | 0% |
- 6. How was the length of the workshop?**
- | | |
|------------|-----|
| Too short | 11% |
| Just right | 85% |
| Too long | 0% |
- 7. What did you like most about this workshop?**
- Handout
 - Relaxing and informative
 - New insights
 - The handouts
 - Presenter was very good.
 - Wide field of the whole view
 - Provided things to think about that I had not previously considered.
 - Pointing out things I need to address.
 - Most important to make a financial plan
 - Helpful with showing how inflation and healthcare will affect our retirement savings/spending
 - Importance of income evaluation and SWP's
 - The calculators and graphs
 - It gave good insight to our next step needed to retire successfully.
 - Showed me where I have to be for retirement.
 - The various different charts
 - Presentation
 - The calculations
 - A wealth of info – good food for thought and action
 - Good pleasant presentation

- **What did you like most about this workshop? (continued)**
 - Good overview
 - Good coverage
 - Awareness of planning
 - Eye-opening, enlightening
 - Number of subjects covered
 - The way it was presented.
 - Provided multiple areas to think about for retirement. Made me see the need to visit with a financial planner/investor now vs. waiting.
 - Start to better prepare for retirement
 - Easy to understand – uncomplicated
 - Good discussion
 - Information about possibilities and options for retirement
 - Different advice
 - Instructor explained very well.
 - Very good speaker
 - Annuity explanation
 - It's too hot in the room

8. How would you improve this workshop?

- Good the way it is. Start planning earlier.
- Couple of margaritas – no was good as is.
- Lengthen to four hours. Provide pension plan specifics such as options on how to draw from plan.
- Calculators were helpful.
- Time was just right – no changes.
- Nothing
- Not sure – we are planning on attending the next two Saturday workshops.
- Longer time wise
- Nothing
- Smaller class
- I wouldn't change it.
- Real life examples, using the average income of the trades, pension account, expenses
- It was fine.
- Couldn't see the presentation – numbers were too small.
- When talking to people with pension – maybe more on that subject
- Doesn't need improvement.
- None for time allotted
- Have your calculators match handouts.
- More specifics/better examples

9. Would you recommend workshop to others? (Circle one) Out of 61: Yes-51 = **96%**
If "YES", who would you recommend it to and why? If "NO", why not? No-2, N/A-8

- Co-workers/trade unions
- Anyone age 45 or older
- Other co-workers
- I would have liked to have seen this five years ago.
- Anyone who is currently working and in the beginning phase of reaching retirement
- A person thinking of retirement
- Guys at work, wives
- Co-workers
- It is great instruction.
- No one should consider retiring without this information.
- Fellow workers
- Others my age
- Those thinking about retirement.
- This should be given to the younger workers as well.
- Very informative
- Friends ready to plan for retirement
- Others in the same age group
- Fellow workers

10. Please provide any other comments that would allow us to improve this workshop:

- Cannot think of a way to improve this in a one and half- hour workshop. Thank you!
- Bigger screen
- Most important to stay healthy
- Longer time wise
- What I needed. Thank you!
- I just wish I had attended the two-day workshop that's my next step.
- Layout of room, white on blue is very hard to read, reference color coding on handouts.
- Handout charts should be in color. I felt too much insurance info was provided.