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| **Q32: What is/was the most helpful resource or type of retirement-planning support that you received? ((from Male Respondents)** |
| * Only the documentation I got from the Faculty Pension Office. |
| * Travel insurance |
| * Financial advice |
| * Advice about extended medical benefits |
| * None |
| * Membership in UBC APE |
| * Group meals and discussions |
| * My Financial Advisor and the UBC Association of Professors Emeriti |
| * Health information |
| * Little or no retirement-planning support was effectly available in 2001! This was a serious UBC shortcoming and involved a challenging transition process from full-time academic work to post-retirement. Presumably this is now being dealt with as the university seems to become increasingly more sophisticated in handling these matters especially via with the new Emeritus College. Most distressing back in the day at retirement time was the lack of substantial help and information regarding the transfer and management of our university PENSION, including an anxiety-ridden learning curve and search for a suitable financial management group in which one could have confidence and peace of mind. |
| * NSERC Grant |
| * Help from Lorraine Hesseltine |
| * Advice from wife |
| * Financial advisor |
| * Workshops to prepare for retirement and meeting the Lorraine Heseltoine who does a great job |
| * Pension |
| * Information/seminars about pension plan/finances. |
| * FPP sessions |
| * Newsletter in |
| * Financial advice, mainly from Paul Marantz |
| * Financial planning, even though it could be greatly improved. |
| * instruction on navigating the financial vehicles like RRIF's and LLIF'S . Eventually I decided to take my retirement fund outside of the University pension plan. It is still a challenge adapting to less income however. Doing worksheets on monthly expenditures etc would have helped. |
| * Financia information |
| * Johnstone's health insurance plan. Good job Paul Marantz!! Opportunities to meet other retirees. |
| * Opportunity to work on a new project |
| * Financial SEminars |
| * HR-sponsored retirement workshop |
| * From my financial advisor |
| * Can't really say. Didn't get any support to speak of. |
| * UBC human resources days on retirement planning. |
| * Information on the FPP. Lorraine is an amazing resource. Also, the information on the benefit and travel plans are very good. |
| * Regular UBC Pension Forum sessions; Retirement Workshops; membership on Faculty Association Executive during the abolition of mandatory retirement, and participation in the creation of the Retirement Options program for the university. |
| * Emeriti status |
| * Health Benefits |
| * Pension plan seminars |
| * a financial advisor from day one of my career. |
| * financial planning support; |
| * Financial Planning |
| * Financial planning from Faculty Pension Plan |
| * Annual lectures on investment, etc. |
| * Financial subsidy for certified financial planner consultant |
| * not much. The FA and HR had sessions in which the participants exchanged ideas. Little hard information. |
| * UBC | Okanagan Campus Faculty Pension Plan Forum |
| * FPP seminars; insurance guidance |
| * Meetings by HR |
| * financial planning for retirement |
| * health insurance information |
| * Allowed me to choose my path |
| * Pension information sessions |
| * Health and finance. |
| * A seminar on financial planning |
| * The 3-hour pre-retirement session with the accompanying binder of copy of slides and notes |
| * Didn't receive or need any |
| * interaction with UBC Faculty Pension Plan personnel |
| * Lorraine Hezeltine FPP seminars |
| * I did not actually receive such support. My last year at UBC I was on leave to take the position of lead scientist for a major water and environmental management program in California. At the end of that assignment I returned to Canada as a retired faculty member |
| * Informal conversations with recently retired colleagues.    A pension planning session put on by the Faculty Pension Plan staff about 18 months before my retirement was also very useful. |
| * Meeting with Lorraine. |
| * Back when I retired (2006), very little information or support was provided. You were largely on your own. |
| * The emeritus web site regarding comparison of insurance options. The people who prepared that did a great service. |
| * Health insurance |
| * Financial |
| * Managing pension... |
| * Ongoing news of pensions |
| * UBC Pension Plan staff |
| * My Assante financial advisor. |
| * N/A |
| * Editing and reviewing articles and book manuscripts |
| * Frequent email and news from the Pensions office. |
| * The extended health information |
| * Library |
| * Just talking with colleagues who had already transitioned to retirement or those planning on retirement. |
| * Faculty Association- organized seminars. |
| * Information about pension plan |
| * Talk by HR; presentation by external financial adviser. In truth, there was very little from the UBC end; but this was a long time ago. |
| * Extra medical insurance programs |
| * Friends and UBC retirement meetings |
| * FOS/University retirement seminars/talks |
| * information sessions about how to handle my assets in the UBC pension fund |
| * FPP retirement planning options seminar; Extended medical/travel insurance options (Emeritis College seminar & report) |
| * Financial advice |
| * TIAA/CREF; Sun Life Insurance, Nicola Wealth Management I put my retirement funds here, rather than in the UBC pension fund. |
| * Liraary |
| * FInancial planning series and pension information. |
| * ubc faculty financial/retirement meetings |
| * Lectures at UBC about retirement planning |
| * Self. Thought about retirement long in advance. Did it by stages. |
| * N.A |
| * Benefits |
| * Pre retirement seminars |
| * From my personal financial planners. |
| * Financial planning |
| * My Financial Advisor |
| * Extended Health and Travel Plans |
| * Pre-retirement meeting and binder of slides |
| * Discussions with UBC FPP admin office |
| * Learning how to handle my finances myself. I learned this long ago. |
| * Pension and health insurance information |
| * Retirement planning seminars, specifically on pension options and taxation issues. |
| * Entertainment - film group;   Travel insurance information etc. |
| * Self-administered pension with Sun Life |
| * Financial planning by my personal financial planner |
| * There was an information session pre-retirement. I can’t recall an others but I did not often work on campus. |
| * Financial planning and financial advising through my usual adviser at Nesbitt Burns; advice from my accountant; and advice from my lawyer. Reading the Globe and Mail business and investments sections. |
| * Advice to ensure access and continued work with an independent financial planner |
| * Not retired |
| * Health and travel insurance |
| * Medical and travel insurance. Fiscal support for research costs. |
| * Talking to colleagues |
| * seminars of FPP |
| * Group and individual Information sessions with the UBC Faculty Pension Plan people. |
| * 9 |
| * Advice from the Pension Plan office. |
| * Think forward, BUT do not forget past connections and important tasks--plus stay involved with young people(students) and the community at large |
| * medical insurance |
| * Visiting potential retirement homes |
| * Seminars on financial planning |
| * UBC Library, annual pension meetings, parking, email |
| * FPP sessions  Emeritus colleagues |
| * None |
| * Financial planning by UBC pension office. |
| * Extended Health and Travel Plan |
| * An investment club mainly of retirees of similar vintage from chemistry which met monthly to decide what to do with our pensions. At the time we all had to withdraw our pensions from the UBC plan at age 71. |
| * Advice on the UBC Pension plan and benefits and how to allocate my payments from the RRIF and LIF. |
| * Speaking to friends and researching the literature about retirement. Having a plan, taking stock of my interests and creating a new daily schedule for myself |
| * NONE |
| * Information about pension income. |
| * Workshops on financial planning. Various UBC pension options. |
| * Benefits, |
| * None |
| * Alternatives for dealing with the UBC faculty pension |
| * Talking to other (retired) colleagues |
| * I did not receive any special guidance regarding retirement. But I also did not ask for help. I will say that whenever I contacted them the pension office was very helpful. However, I have not tried to contact them for a number of years. |