

The support we offer through our partnership with Mercer Marsh Benefits

Mercer Marsh Benefits (MMB) have developed the Pre-retirement Planning Course, a suite of online courses designed to help you understand your finances so you can have an enjoyable and fulfilling retirement.

The service we offer you

Through our partnership with MMB, we can provide you with 6 months' free access to their Pre-retirement Planning Course, to help you plan for a successful retirement.

- Complete interactive exercises at your own pace
- Browse through information off-line, reference materials and resources to create your own retirement action plans
- Choose the appropriate mix and depth of lifestyle and finance planning for your current situation

Client feedback

“Very easy to use, easy to navigate and professionally produced. Extremely helpful in asking lots of searching questions and providing help and lots of food for thought. Thanks for the opportunity to register for this course.”

What you can expect

After completing the course, you'll have the basis for deciding when to retire.

You'll also have identified key elements of your retirement plan, and have a framework for developing it further to ensure it meets the essentials of retirement:

- Enjoying retirement
- Staying physically, mentally, and financially fit
- Maintaining or increasing social contacts

If you have a partner, you'll be prompted to complete exercises either together, or separately, so you can compare results and discuss any differences of opinion.

Confidentiality statement

BWC and MMB treat all personal data and information provided by you as confidential. We'll not disclose any details to third parties without your express permission, unless required to do so for the safety and welfare of children and vulnerable adults, for audit requirements or if required by law.

We're independent of banks and our support is provided in confidence.

For more information

If you'd like to speak with a client adviser, call our free and confidential Helpline on 0800 0234 834