



Bring PHASE Into Retirement™ to Your Conference

A research-backed, non-financial retirement seminar for advisor, HR, and pre-retiree audiences

Retirement content at most conferences stops at the numbers — asset allocation, tax strategy, distribution rates. But research consistently shows that money alone doesn't predict a satisfying retirement. PHASE Into Retirement™ gives your audience the other half of the conversation: a research-backed framework for the non-financial side of the transition, delivered as a live, interactive session attendees can put to use before they leave the room.

WHAT IS PHASE™?

PHASE™ is a ~50-question assessment that scores five research-grounded dimensions of retirement readiness — the dimensions that determine whether retirement feels like freedom or a void.

P

Purpose

A clear sense of direction and meaning once a job title no longer supplies it.

H

Health

Physical and mental habits that sustain an active, engaged retirement.

A

Activities

A full calendar of pursuits that replace the structure work used to provide.

S

Social Life

Relationships that outlast the office — built before the last day of work.

E

Everyday Life

The daily routines and logistics that hold a satisfying life together.

WHY IT RESONATES WITH A ROOM

41%

of retirees who see friends monthly report being "very happy," vs. 29% who see friends only yearly

These are the conversations your audience is already having informally over coffee and on the golf course. PHASE gives the room a shared language — and a personal data point — to have them well, before retirement day arrives.

60%

of retirees who volunteer report being "very satisfied," vs. 41% of those who don't

SEMINAR FORMAT

Session Options

- 45–60 min keynote
- 90 min interactive workshop / breakout

What's Included

- A keynote grounded in Cam Marston's three decades studying generational change and life transitions
- A live walk-through of the PHASE framework, with attendees scoring themselves in real time
- A take-home PHASE Into Retirement™ Field Guide, or a discount code toward one
- An optional QR code so attendees can complete the full assessment and receive a personalized PHASE report after the session

WHO IT'S FOR

The seminar flexes to the room — the framework doesn't change, but the emphasis does.

Financial Advisor Conferences

NAIFA, FPA, T3, Future Proof-style audiences. Positions PHASE as a practice differentiator advisors bring home to clients.

Corporate HR & Benefits Conferences

Frames PHASE as the missing half of a retirement benefits program — alongside 401(k) and pension education.

Consumer & Pre-Retiree Audiences

Community, association, and membership events where attendees are the assessment-takers themselves.

THE RESEARCH BEHIND IT

PHASE draws on the Harvard Study of Adult Development (Dr. Robert Waldinger), the Canadian Longitudinal Study on Aging, the Center for Retirement Research at Boston College, the CDC National Health Interview Survey, and the Stanford Center on Longevity. Every public research claim is verified by Gerald Bierling, PurposeNext's Head of Research and a professor of research methods and statistics at McMaster University for nearly 30 years.

ABOUT THE SPEAKER

Cam Marston is an internationally recognized speaker on generational differences and life transitions, represented by Premiere Speakers Bureau, Executive Speakers Bureau, AEI, SpeakInc, Eagles Talent, and RMA Connect. He is co-founder of PurposeNext and creator of PHASE Into Retirement™.

“My financial advisors help me define the actions needed to prepare financially for retirement. PHASE helps me define the actions needed to prepare for my life in retirement.”

— MICAH WHEELER, CPA | PARTNER

WHAT ATTENDEES WALK AWAY WITH

- A completed — or started — PHASE assessment across all five dimensions
- A personal starting point for the retirement conversations that matter beyond money
- A copy of, or discount toward, the PHASE Into Retirement™ Field Guide
- A framework they can share with a spouse, partner, or financial advisor

BOOK PHASE FOR YOUR CONFERENCE

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PhaseIntoRetirement.com · PurposeNext.com

PHASE Into Retirement™ Field Guide on Amazon: [a.co/d/0fitdmQS](https://www.amazon.com/dp/B08JFQZQZS)