

NEWS



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“A Meaningful Retirement: Beyond Finances” with Buckingham Advisors Slated

Free, educational session will focus on non-financial aspects of retirement planning

Dayton, Ohio [May 23, 2024] – Retirement planning goes beyond ensuring financial stability. It encompasses non-financial aspects essential for achieving a fulfilling and meaningful retirement. To address this need for more comprehensive retirement planning, [Buckingham Advisors](#) is on June 6, 2024 hosting a retirement readiness session titled, “A Meaningful Retirement: Beyond Finances.” Established in 1987, Buckingham Advisors is an independent financial advisory firm that provides investment management, financial planning, tax, and business services from the company’s four office locations across Ohio.

During this fun educational session, attendees will engage in a series of exercises centered on non-financial retirement issues to help avoid common pitfalls and mistakes that people often experience during their transition to retirement. The session is designed for individuals approaching retirement in the next two to three years or those who have recently retired. The session’s objective is to assist attendees in creating a written plan that defines their work identity in retirement, ensures their time is meaningfully filled, keeps them relevant and connected, and promotes mental and physical activity.

Approximately 65% of people do not include non-financial aspects in their retirement planning. According to a T. Rowe Price study, while 74% of pre-retirees make financial plans for their retirement, only 35% consider emotional and psychological preparation ([Physician on FIRE](#)) ([T. Rowe Price](#)). This indicates a significant gap in holistic retirement planning, emphasizing the need to address factors such as lifestyle changes, social engagement, and personal fulfillment in addition to financial security.

“Often times, non-financial questions can be the most neglected in retirement planning and can lead to frustration and initial disappointment in retirement,” stated session presenter Marla Chambers, CPA, CFP®, CPRC. “Neglecting the non-financial considerations of retirement can lead retirees to spend their early years of retirement without the purpose they thought they would have.”

This free, educational session is open to all interested in attending. There are in-person and virtual options available.

DETAILS AND HOW TO REGISTER

When: Thursday, June 6, 2024, 5:15 pm to 6:15 pm EDT

Topic: A Meaningful Retirement: Beyond Finances (virtual or in-person options)

Presenter: Marla R. Chambers, CPA, CFP®, CPRC

No-Cost to Attend

Journalists, and recent and upcoming retirees are welcome and encouraged to attend at no cost.

Registration and Location: Individuals can attend virtually or in person.

- To participate virtually, click here:
<https://register.gotoweinar.com/register/7784104058582139222>
- The in-person session will be held at the Buckingham Advisors Education Center in Building 5 of the Interstate Executive Center, 6728 Loop Rd, Dayton, OH 45459. Please register in advance at <https://mybuckingham.com/events/a-meaningful-retirement-beyond-finances-workshop>

ABOUT THE PRESENTER

Marla Chambers, CPA, CFP®, CPRC, is a financial planner and retirement coach who assists individuals in preparing for both the financial and non-financial aspects of retirement. She guides retirees in making the most of their early retirement years by helping them define their identity, strengthen relationships, and maintain mental and physical fitness, ensuring a fulfilling and active retirement.

ABOUT BUCKINGHAM ADVISORS

Ohio-based Buckingham Advisors is a unique team of professionals who work together to create professional and personal financial success for their clients. Buckingham's professionals are fiduciaries, putting their clients' needs ahead of their own. The company's core purpose is to improve the lives of clients by providing clarity, simplicity, and the professional expertise of Buckingham's financial planners, investment professionals, tax strategists, and accounting team. Buckingham specializes in aligning the solutions clients need to help them achieve the best possible financial and life outcomes. The firm offers personal and business financial solutions, providing one team for all their clients' financial needs. A complimentary, initial consultation is available for prospective clients (no cost or obligation). For more information visit MyBuckingham.com.

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