

ACCELERANT COACHING

# SPEAKER KIT

ARTHUR SCHWARTZ, PCC



## Speaking, Webinars & Workshops

*Four Practical Programs for Audiences Navigating Retirement*

| PURPOSE             | PEOPLE                 | PASSION            | PROJECTS              | PACE                    |
|---------------------|------------------------|--------------------|-----------------------|-------------------------|
| meaning & direction | connection & community | energy & aliveness | contribution & growth | rhythm & sustainability |

Warm, practical programs about what comes after the financial plan—purpose, identity, relationships, meaningful activity, and the rhythm of everyday life.

### INVITE ARTHUR TO SPEAK

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## SIGNATURE PROGRAMS

# Four Practical Programs for Audiences Navigating Retirement

Each program can be delivered as a keynote, webinar, interactive workshop, or multi-session series—and tailored to the host organization and the people it serves.

## Retire From Work, Not From Life

**Best for:** OLLIs, university retiree and emeriti groups, professional associations, corporate alumni programs, retirement communities, and service organizations

Most people prepare carefully for the retirement date but spend far less time designing the life that follows. This flagship Five Ps™ program helps participants look beyond finances and begin creating a next chapter built around Purpose, People, Passion, Projects, and Pace.

- Recognize the difference between financial readiness and life readiness.
- Use the Five Ps™ to identify strengths, gaps, and priorities.
- Choose one realistic action that creates meaning, connection, or momentum.

**Recommended: 45–60 minutes plus audience Q&A; virtual or in person**

## Who Are You When the Title Goes Away?

**Best for:** Retiring executives, business owners, physicians, attorneys, academics, engineers, and other accomplished professionals

A successful career can become deeply intertwined with identity, status, relationships, and purpose. This program helps participants understand why leaving a professional role can feel disorienting—and how to build an identity larger than the position they once held.

- Understand the identity shifts that commonly accompany retirement.
- Separate enduring values and strengths from a former title or role.
- Identify new ways to contribute, connect, learn, and remain relevant.

**Recommended: 45–60 minutes plus audience Q&A; virtual or in person**

## SIGNATURE PROGRAMS

# Programs for Advisors, Couples, and Their Communities

## Beyond the Financial Plan

**Best for:** Financial-advisor clients, FPA chapters, estate-planning councils, benefits programs, and professional-service firms

A sound financial plan answers whether someone can afford to retire. It does not answer how they will create meaning, structure, connection, and fulfillment after work. This program gives clients and advisors a practical language for addressing the human side of retirement.

- Identify the retirement questions that fall outside the financial plan.
- Connect financial resources with the life those resources are intended to support.
- Begin productive conversations with partners, families, and trusted advisors.

**Recommended:** 45–60 minutes plus audience Q&A; virtual or in person

## Couples in Retirement: Designing the Next Chapter Together

**Best for:** Advisor client events, couples groups, alumni organizations, retirement communities, and people approaching retirement with a spouse or partner

Retirement may bring couples more shared time than they have experienced in decades. This program helps couples begin the conversations that make a shared retirement work for both people.

- Surface expectations about time, togetherness, independence, and routines.
- Distinguish shared priorities from individual needs using the Five Ps™.
- Choose one conversation or experiment for a more intentional retirement together.

**Recommended:** 45–60 minutes plus audience Q&A; virtual or in person

## A shared foundation

| PURPOSE             | PEOPLE                 | PASSION            | PROJECTS              | PACE                    |
|---------------------|------------------------|--------------------|-----------------------|-------------------------|
| meaning & direction | connection & community | energy & aliveness | contribution & growth | rhythm & sustainability |

*Every program is educational and reflective—not therapy, financial advice, product promotion, or a sales presentation.*

## FLEXIBLE DELIVERY

# Formats for Your Audience and Event

### **Keynote / interactive presentation** 45–60 minutes

Clear stories, relatable examples, guided reflection, and audience questions.

### **Extended workshop** 75–90 minutes

More discussion, exercises, and application of the Five Ps™ Framework.

### **Client education event** 45–90 minutes

A trusted complement for financial-advisor, benefits, alumni, or member audiences.

### **Retirement-readiness program** Single or multi-session

A deeper experience for organizations helping employees or members prepare for life after work.

### **Virtual presentation** 45–90 minutes

Engaging live delivery by Zoom or the host's platform, with reflection and moderated Q&A.

## Every engagement can include

- A planning conversation about the audience, event goals, format, and timing
- Examples and reflection questions tailored to the audience's stage and interests
- An optional Five Ps™ worksheet or participant handout
- Moderated question-and-answer time
- Practical follow-up resources participants can continue using

**Programs may be delivered in person or virtually and adapted to the experience, interests, and size of the group.**

## Looking for a deeper experience?

Design Your Next Chapter is a six-week small-group workshop that guides participants from reflection to a practical 90-day plan.

**Explore Design Your Next Chapter**

## WHO THE PROGRAM SERVES

# Ideal Audiences

**Financial-services organizations.** Client education events that complement financial planning with the life side of retirement.

**Corporate pre-retirement audiences.** Employees and leaders preparing for the identity, relationship, structure, and lifestyle changes ahead.

**Retirement communities.** Residents and prospects seeking connection, contribution, engagement, and a satisfying rhythm.

**Lifelong-learning programs and libraries.** Curious adults exploring meaning, community, learning, and possibility in later life.

**Professional and alumni associations.** Members navigating a transition from career achievement to a personally meaningful next chapter.

**Service and community organizations.** Rotary, Kiwanis, chambers, nonprofits, faith communities, and other groups that value purposeful living.

**Conference and association events.** Keynotes, breakouts, workshops, and member programs focused on retirement readiness and life transition.

## Especially relevant for

- People approaching retirement who have planned financially but have not yet planned daily life
- Successful professionals asking what purpose, identity, and contribution look like after work
- Couples who want better conversations about shared priorities and different visions of retirement
- People already retired who want to refresh the balance, energy, or direction of this chapter

## ABOUT THE SPEAKER

# Arthur Schwartz, PCC



Arthur Schwartz, PCC, is a retirement-transition coach and the creator of the Five Ps™ Framework. He helps accomplished professionals move from the identity and structure of a demanding career toward a retirement that is purposeful, connected, engaging, and sustainable.

Across more than 35 years, Arthur has helped professionals and organizations navigate change. As an independent coach, he spent 18 years partnering with global technology companies—including Cisco—coaching leaders and facilitating development programs around the world.

After navigating his own transition from full-time work, Arthur developed the Five Ps™ Framework to give people a practical way to design the non-financial side of retirement. His speaking style is warm, candid, conversational, and grounded in real life.

## Credentials and perspective

- Professional Certified Coach (PCC), International Coaching Federation
- C-IQ Certified Coach, Level 3 Conversational Intelligence®
- 35+ years helping professionals and organizations navigate leadership, change, and transition
- 18 years as an independent coach and facilitator partnering with global technology companies, including Cisco
- Creator of the Five Ps™ Framework: Purpose, People, Passion, Projects, and Pace

*Outside of coaching, Arthur stays connected to the themes he teaches through outrigger canoeing, RV travel, hiking, family, and an active life in San Diego.*

FOR THE HOST OR EMCEE

## Suggested Introduction

Most people spend years preparing financially for retirement—but far less time preparing for the life they will live when work no longer provides identity, structure, relationships, challenge, and a familiar pace.

Our speaker today helps people prepare for that life transition. Arthur Schwartz is a Professional Certified Coach through the International Coaching Federation and has more than 35 years of experience helping professionals and organizations navigate change. As an independent coach, he spent 18 years partnering with global technology companies, including Cisco.

After experiencing his own transition from full-time work, Arthur created the Five Ps™ Framework—a practical way to design retirement around Purpose, People, Passion, Projects, and Pace.

Please welcome Arthur Schwartz, presenting '[PROGRAM TITLE].'

*Approximate reading time: 60–75 seconds. The host may shorten the second paragraph when event timing is tight.*

### Replace [PROGRAM TITLE] with

- Retire From Work, Not From Life
- Who Are You When the Title Goes Away?
- Beyond the Financial Plan
- Couples in Retirement: Designing the Next Chapter Together

## EVENT PLANNING

# AV and Setup Requirements

### In-person presentation

- Projection screen or large display suitable for presentation slides
- Computer connection via HDMI or USB-C; Arthur can provide slides in advance when requested
- Wireless lavalier or headset microphone for rooms where amplification is appropriate
- Presentation remote/clicker and confidence monitor preferred for larger venues
- Room arranged so Arthur can see and engage the audience; classroom, cabaret, or theater seating can all work
- A small table or lectern for water and notes; a fixed lectern is not required
- Printed Five Ps™ handouts placed at seats or distributed at the appropriate point in the program, if used

### Virtual presentation

- Zoom or the host's preferred platform, with screen sharing and chat enabled
- A designated host or moderator to admit participants, manage chat, and support Q&A
- A brief technical check 15–30 minutes before start time
- Audience cameras optional; polls, chat prompts, and private reflection can be used to sustain engagement

### Planning notes

- Arthur tailors emphasis and examples after a short planning conversation with the host
- Recording, rebroadcast, photography, and distribution of slides or materials should be agreed in advance
- Accessibility needs—captioning, large-print handouts, mobility considerations, or other accommodations—are welcomed during planning

BRING THE FIVE PS™ TO YOUR ORGANIZATION

# Booking and Contact

Arthur will work with you to understand your audience, event goals, preferred format, and timing. The initial conversation is complimentary and carries no obligation.

|                                                                         |                                                                                    |                                                                               |
|-------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| <b>1</b>                                                                | <b>2</b>                                                                           | <b>3</b>                                                                      |
| <b>Start the conversation</b>                                           | <b>Shape the program</b>                                                           | <b>Create a meaningful experience</b>                                         |
| Share your audience, event date, goals, location, and preferred format. | Arthur recommends the best length, level of interaction, and supporting materials. | Your audience leaves with reflection, practical ideas, and a clear next step. |

CONTACT ARTHUR

**Arthur Schwartz, PCC**

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**Accelerant Coaching—Home of the Five Ps Retirement Framework™**

**Purpose • People • Passion • Projects • Pace**