



adoc

To master Employee
Savings and Retirement

Appropriate training tools
Better informed employees
Optimised savings

adoc

To master Employee Savings and Retirement

Employee savings and retirement are benefits for all employees. Engaged through collective management, employees are involved in company plans.

Technical and constantly evolving, not all plans are easy to understand and master.



Learn about employee savings and retirement!

To inform employees and enable them to benefit from financial education tools, Amundi Employee Savings and Retirement offers:

Adoc, an innovative training solution on employee savings and retirement that adapts to the needs of companies

In-person and distance modules or mobile app formats, in French or English, are available on the following topics:

Retirement

Financial management

Employee savings schemes

Employee share ownership

The Supervisory Board of investment funds

Designed according to a participatory, interactive, concrete approach that builds on the participants' knowledge and experience.

Sessions alternate presentation time, application phases, simulations, practical cases, questionnaires, and educational games.

Employee savings and retirement... a world of benefits!

Adoc: giving you the keys to employee savings and retirement!

Our training courses are intended for various audiences:

Human Resources Managers and Officers

Mastering all aspects of employee savings means optimising the company's systems and promoting them among all employees.

Representatives of Supervisory Boards of Employee Mutual Funds (FCPE)

Being familiar with financial management and the role of the Supervisory Board means performing fund supervision and employee information effectively.

Members of the Social and Economic Committee (SEC)

Training in employee savings and retirement means assessing the challenges and providing the best support to employees.

Employees

Understanding employee savings means having the tools to make major life plans a reality.

Adoc, a solution designed by Amundi, number 1 in employee savings and retirement

Amundi Employee Savings and Retirement offers its know-how to serve employees and employers with innovative teaching methods and an effective range of training solutions.

Training designed and led by an experienced team:

- » 5 professionals in financial savings, instruction, and communication design our training courses.
- » 20 specialists in management and employee savings schemes lead sessions.

The commitment of Adoc:

- knowledge transfer through human experience and collective intelligence
- guide participants towards independence
- ensure effective learning through innovative methods and appropriate tools



6 training modules offered

Visa for retirement

Keys to financial management

3D view of employee savings and retirement

Mapping of employee share ownership

The Supervisory Board of the employee mutual fund in three acts

International Supervisory Board of the employee mutual fund



Contact your representative at Amundi Épargne Salariale et Retraite

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Disabilities ?

To best suit training methods to your situation, kindly inform us in advance of any disabilities to take into consideration.

More information on access to training for people with disabilities on the AGEFIP website.

Evaluation methods

The trainer will evaluate the progress of the participants through practical application exercises.



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January 2024

—
In-person module
Approval for retirement

—
**Retirement
plans: peace
of mind**



In-person module

Approval for retirement

Goals

Train the participant in:

- » preparing a retirement plan under the French system
- » the available individual and collective solutions

Knowledge gained

By the end of the training, participants will be able to:

- » prepare for retirement based on their individual life plans
- » list the financial needs inherent in carrying out these plans
- » master the organisation and the systems of retirement schemes
- » calculate income from compulsory schemes and assess any additional financing needs
- » select appropriate solutions to finance those needs

Contents and methods

Our modules offer:

- » **a participatory, interactive approach** based on the knowledge and experience of the participants, alternating presentation time and application phases
- » **a motivational, fun method** combining simulations, practical cases, exercises, questionnaires, and educational games
- » **concrete, pragmatic training** including information, methods, and legal frameworks

Public

- » Human Resources Teams
- » Members of Supervisory Boards of employee mutual funds (FCPE)
- » Employee representatives
- » Employees



Duration
7 hours
Group
8 to 16 people
Prerequisites
No level of knowledge or practice is required
Price
€1,900 excl. tax Intra-company

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To master Employee
Savings and Retirement

In-person
or distance module
**Keys to financial
management**

**Savings
optimised to
meet your
needs!**



In-person or distance module

Keys to financial management

Goals

Train the participant in:

- » the organisation and operation of financial markets
- » investment funds and understanding savings choices

Knowledge gained

By the end of the training, participants will be able to:

- » detail the role and operation of financial markets
- » master the principles of return and risk, arbitrage, and diversification
- » select funds according to the investor's risk profile and investment period
- » distinguish management approaches and styles
- » assess the performance and risks of funds on the basis of available information

Contents and methods

Our modules offer:

- » a **participatory, interactive** approach based on the knowledge and experience of the participants, alternating presentation time and application phases
- » a **motivational, fun method** combining simulations, practical cases, exercises, questionnaires, and educational games
- » **concrete, pragmatic training** including information, methods, and legal frameworks

Public

- » Human Resources Teams
- » Members of Supervisory Boards of employee mutual funds (FCPE)
- » Employee representatives
- » Employees



Duration
7 hours for in-person module 2 times 4 hours + 2 preparatory workshops of 1 hour for distance module
Group
8 to 16 people for in-person module 5 to 10 people for distance module
Prerequisites
No level of knowledge or practice is required
Price
€1,900 excl. tax Intra-company

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To master Employee
Savings and Retirement

January 2024

—
In-person or distance module
**3D view of employee
savings and retirement**
—

**Know
everything
about employee
savings and
retirement!**



In-person or distance module

3D view of employee savings and retirement

Goals

Train the participant in:

- » the principles of employee savings and retirement
- » the operation of schemes and employee transactions

Knowledge gained

By the end of the training, participants will be able to:

- » identify the goals of employee savings and principle stakeholders
- » distinguish the purpose and the characteristics of schemes
- » understand the frameworks for the establishment and operation of schemes
- » detail the composition and the tasks of the Supervisory Board of investment funds
- » describe the main transactions carried out by employees

Contents and methods

Our modules offer:

- » **a participatory, interactive approach** based on the knowledge and experience of the participants, alternating presentation time and application phases
- » **a motivational, fun method** combining simulations, practical cases, exercises, questionnaires, and educational games
- » **concrete, pragmatic training** including information, methods, and legal frameworks

Public

- » Human Resources Teams
- » Members of Supervisory Boards of employee mutual funds (FCPE)
- » Employee representatives
- » Employees



Duration
7 hours for in-person module 2 times 4 hours + 2 preparatory workshops of 1 hour for distance module
Group
8 to 16 people for in-person module 5 to 10 people for distance module
Prerequisites
No level of knowledge or practice is required
Price
€1,900 excl. tax Intra-company

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To master Employee
Savings and Retirement

In-person or distance module
**Mapping of employee
share ownership**

**Employee share
ownership, here
we come!**



In-person or distance module

Mapping of employee share ownership

Goals

Train the participant in:

- » the various forms of employee share ownership and the resulting benefits and obligations
- » the establishment and operation of employee share ownership plans

Knowledge gained

By the end of the training, participants will be able to:

- » distinguish the objectives and the characteristics of the forms of employee share ownership
- » detail how an employee share ownership transaction works and the possible offerings
- » assess communication issues
- » analyse the impact of events on the employee share ownership fund
- » explain the tax and regulatory aspects

Contents and methods

Our modules offer:

- » **a participatory, interactive approach** based on the knowledge and experience of the participants, alternating presentation time and application phases
- » **a motivational, fun method** combining simulations, practical cases, exercises, questionnaires, and educational games
- » **concrete, pragmatic training** including information, methods, and legal frameworks

Public

- » Human Resources Teams
- » Members of Supervisory Boards of employee mutual funds (FCPE)
- » Employee representatives
- » Employees



Duration
7 hours for in-person module 2 times 4 hours + 2 preparatory workshops of 1 hour for distance module
Group
8 to 16 people for in-person module 5 to 10 people for distance module
Prerequisites
No level of knowledge or practice is required
Price
€1,900 excl. tax Intra-company

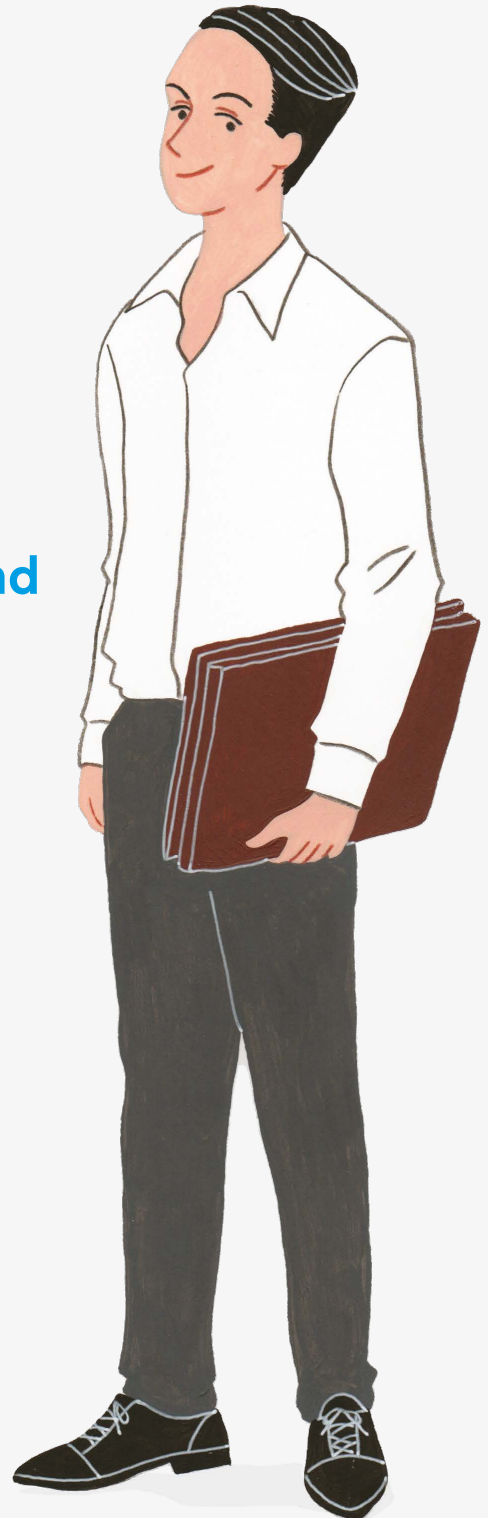
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To master Employee
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January 2024

In-person module
**The Supervisory Board
of the employee mutual fund
in three acts**

**3 days
to better
represent
employee
investors!**



In-person module

The Supervisory Board of the employee mutual fund in three acts

3D view of employee savings and retirement

Fulfil the mandate of Supervisory Board member

By the end of the training, participants will be able to:

- » identify the goals of employee savings according to those involved
- » distinguish the purpose and the characteristics of schemes
- » understand the frameworks for the establishment and operation of schemes
- » detail the composition and the tasks of the Supervisory Board of investment funds
- » describe the main transactions carried out by employees

Keys to financial management

Supporting employees in their investment decisions

By the end of the training, participants will be able to help employees:

- » detail the role and operation of financial markets
- » master the principles of return and risk, arbitrage and diversification
- » select funds according to the investor's risk profile and investment period
- » distinguish investment approaches and styles
- » assess the performance and risks of funds on the basis of available information

Behind the scenes of employee savings and retirement

Immerse yourself in a asset management company and meet the players

By the end of the day, participants will be able to:

- » trace the processing of an employee investor's transaction
- » identify the fund manager's actions and trading on the financial market
- » understand the management of SRI and solidarity funds
- » make the link between transactions, fund reporting and the annual report of the fund



Duration
3 times 7 hours
Group
8 to 16 people
Prerequisites
No level of knowledge or practice is required
Price
€5,000 excl. tax Intra-company

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To master Employee
Savings and Retirement

January 2024

Distance module
**The Supervisory Board
of the employee mutual fund
in three acts**

**3 days
to better
represent
employee
investors!**



Distance module

The Supervisory Board of the employee mutual fund in three acts

The schemes of employee savings and retirement

Distinguish their purposes and characteristics

By the end of the training, participants will be able to :

- » identify the goals of employee savings according to those involved
- » define the purpose of schemes
- » recognize the characteristics of schemes

The role of the Supervisory Board of the employee mutual fund

Fulfil the mandate of Supervisory Board member

By the end of the training, participants will be able to :

- » detail the composition and the tasks of the Supervisory Board of investment funds
- » learn about the fund's annual report
- » describe the main transactions carried out by employees

The operation of financial markets

Understand their principles and mechanisms

By the end of the training, participants will be able to help employees:

- » detail the role and operation of financial markets
- » distinguish between shares, bonds and money market securities
- » master the principles of risk and return, arbitrage and diversification

The keys to investment funds

Supporting employees in their investment decisions

By the end of the training, participants will be able to help employees:

- » select funds according to the investor's risk profile and investment period
- » identify the types of funds and investment approaches
- » assess the performance and risks of funds on the basis of available information



Duration
4 times 4 hours + 4 preparatory workshops of 1 hour
Group
5 to 10 people
Prerequisites
No level of knowledge or practice is required
Price
€5,100 excl. tax Intra-company
€1,900 excl. tax per participant Inter-companies

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Distance module
**International Supervisory
Board of the employee
mutual fund**

**All the cards
to represent
employee
investors
worldwide!**



Distance module International Supervisory Board of the employee mutual fund

Employee savings around the world

Distinguish their purposes and characteristics

By the end of the training, participants will be able to :

- » identify the goals of employee savings according to those involved
- » define the purpose of employee share ownership forms around the world
- » recognize the characteristics of forms and offerings

The role of the Supervisory Board of the employee mutual fund

Fulfil the mandate of Supervisory Board member

By the end of the training, participants will be able to :

- » detail the composition and the tasks of the Supervisory Board of investment funds
- » learn about the fund's annual report
- » describe the main transactions carried out by employees

The operation of financial markets

Understand their principles and mechanisms

By the end of the training, participants will be able to help employees :

- » detail the role and operation of financial markets
- » distinguish between shares, bonds and money market securities
- » master the principles of risk and return, arbitrage and diversification

Keys to investment funds

Supporting employees in their investment decisions

By the end of the training, participants will be able to help employees :

- » select funds according to the investor's risk profile and investment period
- » identify the types of funds and investment approaches
- » assess the performance and risks of funds on the basis of available information



Duration
4 times 4 hours + 4 preparatory workshops of 1 hour
Group
5 to 10 people
Prerequisites
No level of knowledge or practice is required
Price
€5,100 excl. tax Intra-company
€1,900 excl. tax per participant Inter-companies