



**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.



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## 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:

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Retirement

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Financial management

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Employee savings schemes

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Employee share ownership

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The Supervisory Board of investment funds

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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!

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## 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.

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## 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.

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## 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



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## 6 training modules offered

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Visa for retirement

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Keys to financial management

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3D view of employee savings and retirement

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Mapping of employee share ownership

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The Supervisory Board of the employee mutual fund in three acts

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International Supervisory Board of the employee mutual fund



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## Contact your representative at Amundi Épargne Salariale et Retraite

adoc.formation@amundi.com  
+33176326248

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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.

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## Evaluation methods

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

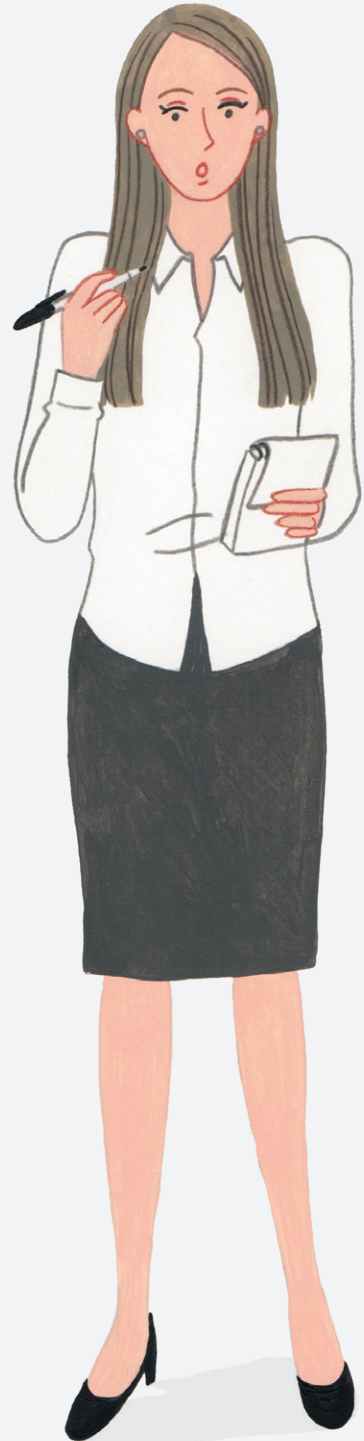


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To master Employee  
Savings and Retirement

—  
In-person module  
**Approval for retirement**

—  
**Retirement  
plans: peace  
of mind**



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# In-person module

## Approval for retirement

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### 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



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



# adoc

To master Employee  
Savings and Retirement

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

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**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



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

# adoc

To master Employee  
Savings and Retirement

October 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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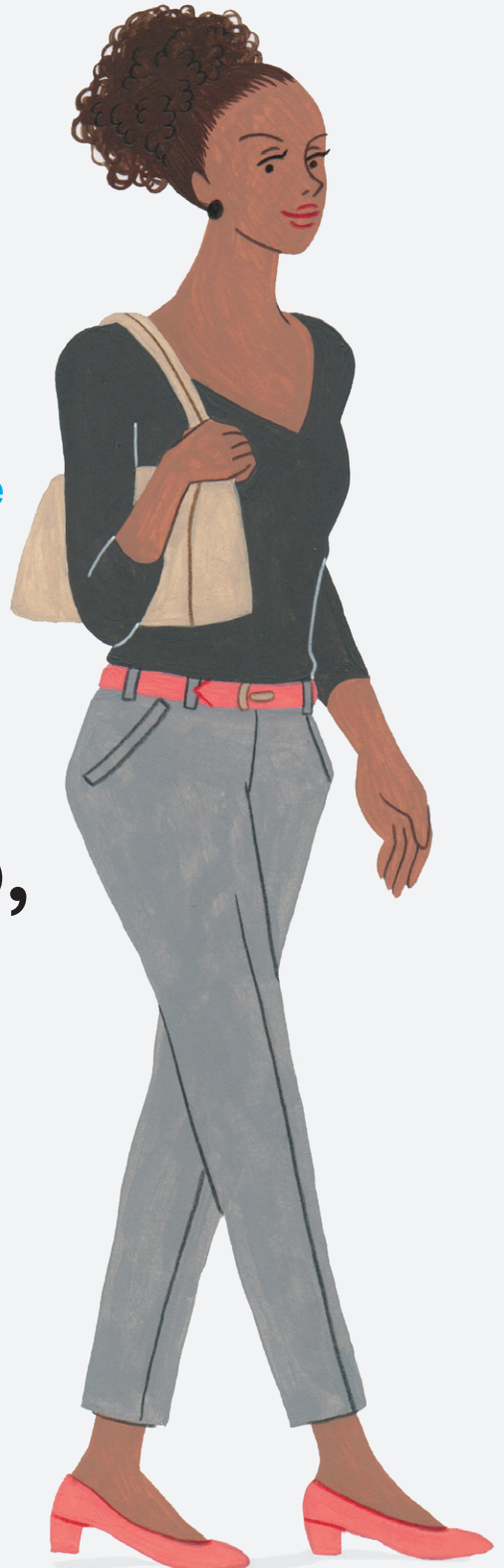
To master Employee  
Savings and Retirement

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In-person or distance module  
Mapping of employee  
share ownership

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



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# In-person or distance module

## Mapping of employee share ownership

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### 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



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

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To master Employee  
Savings and Retirement

October 2024

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

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



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# In-person module

## The Supervisory Board of the employee mutual fund in three acts

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### 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



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



# adoc

To master Employee  
Savings and Retirement

October 2024

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

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



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# Distance module

## The Supervisory Board of the employee mutual fund in three acts

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### 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



<b>Duration</b>
4 times 4 hours + 4 preparatory workshops of 1 hour
<b>Group</b>
5 to 10 people
<b>Prerequisites</b>
No level of knowledge or practice is required
<b>Price</b>
€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**

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



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# Distance module International Supervisory Board of the employee mutual fund

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## 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



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