University of Gdańsk

Subject card

Subject name and code	Retirement Planning, PG_00179755
Field of study	Finance and Accounting, Informatics and Econometrics, Management

Date of commencement of studies	October 2025	Academic year of realisation of subject	2025/2026
Education level	Master's studies	Subject group	Optional subject group
Mode of study	full-time studies	Mode of delivery	at the university
Year of study	1	Language of instruction	English
Semester of study	1	ECTS credits	2.0
Learning profile	academic	Assessment form	credit

Conducting unit	

Name and surname of lecturer (lecturers)	Subject supervisor	dr Kamila Bielawska
	Teachers	

Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	15.0	0.0	0.0	0.0	0.0	15
	E-learning hours included: 0.0						

Learning activity and number of study hours	Learning activity	Participation in didactic classes included in study plan	Participation in consultation hours	Self-study	SUM
	Number of study hours	15	1.0	34.0	50

Subject objectives	The aim of the course is to prepare the student for active pension risk management with a flexible approach to changing needs in retirement.

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[ZARZMU2_U07] Students can create detailed written papers, including reviews, analyses, or research, along with presentations and oral discussions on management topics.	The student develops an individual pension plan based on the assumptions made.	[SU3] text preparation/written work
	[FiRMU2_W02] The student possesses a comprehensive understanding of the complexities and functions of both domestic and international financial markets, as well as financial instruments and institutions.	The student understands the need for retirement planning taking into account available financial instruments, including insurance.	[SW4] test/exam - oral or written
	[ZARZMU2_W02] The student has an in-depth knowledge and understanding of various organizations, including their complexities, functional areas, internal processes, and their interactions with the environment.	The student understands the need for retirement planning taking into account available financial instruments, including insurance.	[SW4] test/exam - oral or written
	[FiRMU2_U07] Students can create detailed written papers, including reviews, analyses, or research papers, along with presentations and oral speeches on finance and accounting topics.	The student develops an individual pension plan based on the assumptions made.	[SU3] text preparation/written work
	[IiEMU2_U07] Students can prepare detailed written papers, presentations, and oral speeches on econometrics, informatics, or statistics issues.	The student develops an individual pension plan based on the assumptions made.	[SU3] text preparation/written work
	[IiEMU2_W02] The student comprehends advanced theoretical and practical concepts in econometrics, informatics, or statistics, which are essential for a deeper understanding of economic and social phenomena.	The student understands the need for retirement planning taking into account available financial instruments, including insurance.	[SW4] test/exam - oral or written

Subject contents	Lifestyles and expectations in retirement The subjective nature of retirement risk Estimating sources of income and expenditure during working life Estimating the need for financial resources and access to services in old age Sources of coverage: benefits from the public system, benefits (funds) from occupational and individual pension plans, private life insurance (including annuities)

Prerequisites and co-requisites	

Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	project (development of the individual retirement plan)	51.0%	40.0%
	written or oral (individual term) assessment	51.0%	60.0%

Recommended reading	Basic literature	Adams G.A., Beehr T.A. (eds.), Retirement: Reasons, Processes, and Results, Springer Publishing Company 2003.
		Bielawska, K., & Kozłowski, A. (2024). A proposal for retirement risk measurement based on subjective assessment of income: an empirical study. *Social Indicators Research*, *172*, 128. https://doi.org/10.1007/s11205-023-03295-3
		Brown, Jeffrey R., Rational And Behavioral Perspectives On The Role Of Annuities In Retirement Planning, Working Paper 13537, http://www.nber.org/papers/w13537
		Tresidder T., How Much Money Do I Need to Retire. Uncommon Financial Planning Wisdom for a Sress-Free Retirement, FinancialMentor.com

	Supplementary literature	Lusardi, Annamaria and Mitchell, Olivia S., Financial Literacy and Retirement Planning in the United States, https://www.nber.org/system/files/working_papers/w17108/w17108.pdf Petkoska J., Earl J. K., Understanding the Influence of Demographic and Psychological Variables on Retirement Planning, Psychology and Aging 2009, Vol. 24, No. 1, 245251.
	eResources addresses	
Example issues/ example questions/ tasks being completed		
Work placement	Not applicable	

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