

Manager Guide | India Retirement Process

1. Overview

At Adobe, we endeavor to ensure all employees have the best possible experience at every step of their employment and we recognize retirement as an important milestone in an employee's life.

As a people manager, it's important to be mindful of how this job change may affect your team member approaching retirement. Your support can make a meaningful difference during this transition. This guide is designed to help you navigate this process providing you with the insights and resources needed to ensure smooth and supportive experience for your team-member.

2. Actions

Here are some suggestions for you to ensure a seamless job transition for your team-member. ERC shall send a notification of the impending date of retirement as per the below-mentioned timelines:

- For Director & above: 24 months prior
- For Other employees: 18 months prior

Actions before the Retirement of the employee:

1. Preparing yourself for the conversation:

- Once you receive the retirement notification from ERC, begin planning for the transition so you're ready to guide your team-member through the change.
- Familiarize yourself with the available Retirement Resources on the Benefits Portal to better understand the process and support options. As a people leader, it is imperative to facilitate transparent, empathetic dialogue and provide access to relevant resources that will empower the team-member to navigate this career transition with clarity and confidence.
- If you need further assistance or have specific concerns, feel free to reach out to your HR Business Partner (HRBP) for additional guidance.

2. Meeting the Employee:

- Schedule a 1:1 meeting with your team-member. This should be a preliminary meeting and should focus mainly upon retirement process initiation, share information on the available resources and what they should expect in upcoming months.
- Retirement Rewards Guidance: Proactively engage with the retiring team-member to ensure they are equipped to make informed decisions regarding their Restricted Stock Units (RSUs). Given that any unvested RSUs beyond the employee's last working date at Adobe will be forfeited and there is no provision for pre-vesting/accelerated vesting - it is advisable to encourage a thorough review of their vesting schedule in alignment with their planned retirement timeline. To ensure the retiring employee receives the best support with their RSU-related queries, they can also reach out to the Equity team by raising a ticket via the [Support Center](#).
- Financial Planning Assistance: Managers should recommend that the employee consult a financial advisor to optimize their financial management strategy. The team-member can reach out to our EAP partner - [1to1 help](#) for assistance on financial planning matters including Investments, Taxation etc. (All services related to EAP will cease post the last working day and the team-member should access the resources while they are employed with Adobe).
- Retirement Planning Assistance: Manager can also recommend other EAP resources which are available in the vendor partner- [1to1 help](#) website for preparing the team-member for this life event. This includes reading materials, assessments etc. which will help the team-member strengthen his readiness for retirement. Counseling sessions for legal or matters related to diet/nutrition can also be availed by the team-member via [1to1 help](#).
- Be cognizant of your team member's emotions while communicating the retirement process and note down the discussion points for future reference

3. Planning Succession & Transition:

- Post the discussion with the retiring team-member, communicate the upcoming retirement timeline to all impacted stakeholders.
- Ensure business continuity through timely succession planning which involves assessing the role's impact, identifying potential successors, and supporting their development through structured transition plans. Succession planning is essential as it ensures business continuity, minimizes disruption, and helps retain critical institutional knowledge by preparing the next incumbent to step into the expected role seamlessly.
- Partner with HRBP or Talent Acquisition team with the refined role definition and skill matrix to initiate talent discussions — including internal mobility options or external sourcing.
- Develop a transition roadmap and co-create a timeline along with clearly defined responsibilities for knowledge transfer. Assess workstreams and map dependencies with the team-member to identify ongoing tasks and critical deliverables.
- Start planning for the required changes in the structure for your team member's Org (in case they are in a managerial role) with your BU Leader and HRBP.

4. Partnering for Success:

- Keep track of the progress based on the transition plan developed with a mutually decided cadence, ensuring key milestones are met on time.
- Promote proactive knowledge transfer by encouraging the employee to share role-specific insights during regular team touchpoints or to document critical processes and workflows unique to their function.

Actions 6 months before Retirement Date:

- ERC will initiate the exit formalities 6 months in advance of the retirement date and your role would be to ensure that your team member completes their exit formalities as per timelines.
- Closure of Transition Process: Connect with your employee for wrapping up the transition plan.

Actionable a week before Retirement Date:

- Plan a meeting with the team & your BU Leader to acknowledge & celebrate the contribution of your team member at Adobe & bid farewell.