

RETIREMENT PLANNING SEMINAR OUTLINE

9.45am: Registration & Tea / Coffee / Scones

10am: Introductions & Welcome

10.05: Session 1: THE MENTAL ADJUSTMENTS OF RETIREMENT

Presenter – Retirement Planning Council

Research shows that most of us get our mental stimulation from the work we do. When work is no more where will you get this challenge? In this session we discuss how to maintain mental wellbeing and embrace new experiences etc.



10.50am: Session 2: STATE BENEFITS IN RETIREMENT

Presenter – Retirement Planning Council

This session will provide you with information on the State Pension and who is entitled to claim; How, when and where to make your claim. Information on other State Benefits that you may be entitled to will also be discussed and explained.

12noon: Coffee break

12.10pm: Session 3: YOUR ORGANISATION'S PENSION SCHEME

Presenter – Irish Life

This session will outline how you can draw down your pension fund at retirement. What to consider prior to your retirement e.g., should you make any Additional Voluntary Contributions (AVCs); should you review your investment fund decisions; when should you start engaging with Irish Life about your retirement fund: who will advise you on the best way to draw down your pension fund at retirement? what documentation do you need to give Irish Life to finalise your retirement claim?



1.15pm: Lunch

2.15pm: Session 4: WILLS AND INHERITANCE

Presenter – Retirement Planning Council

This session will outline why it is important to make a Will and advice on how to go about making one. Inheritance tax rates will be explained, which are measured by the value of the inheritance and the relationship between you and the person you leave your inheritance to.



2.50pm: Session 5: PHYSICAL & NUTRITIONAL WELLBEING IN RETIREMENT

Presenter - Physical Wellbeing Expert

This session will discuss the requirements in each of the areas above so that the chance of a long healthy and enjoyable retirement is improved.



3.45pm: How to book a one-to-one meeting with your Irish Life Advice Team Point of Contact

Presenter – Irish Life

This session will outline who the Irish Life Advice Team are and how you can make an appointment to meet your dedicated Advice Team member on a date suitable to you.



4pm: Close Retirement Seminar