

# 2021 Online workshops



## Member choice education

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## AGENDA

- Understanding your fund's benefits
- Understanding your risk benefit needs
- Understanding your fund's investment choices
- The impact of contributions and tax consequences
- Understanding the purpose of retirement funds
- Net replacement ratio - what it means for you
- Annuities - all that you need to know
- Tax treatment at retirement
- A holistic approach to budgeting
- Savings vehicles to supplement your retirement fund
- Pensionable salary
- What activities to get involved in after retirement
- Basic investment and economic principles (with an economic update)
- Setting up your personal retirement plan
- Time management and its impact on your retirement
- Managing and prioritising debt
- Financial planning for your retirement
- Medical provisions for when you retire
- Estate planning and drawing up a Will
- Investment benchmarks and performance measurement
- Selecting a suitable financial advisor
- Who are my dependents and how will my death benefit be distributed?
- Executive power hours - wealth management issues
- Retirement counselling
- Debt management



PROGRAMMA SUIDWYDE DE ERVEN