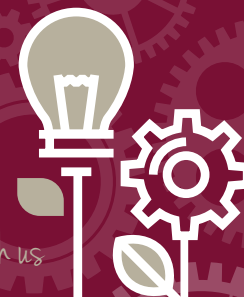


pension planning.

Grow your knowledge with us



Length of course: 1 hour 30 minutes

Summary

Within the ever changing landscape of State and workplace pensions, pension planning has never been more important. Many people miss out on the genuine benefits and opportunities that come from planning ahead and being aware of the opportunities available to them. This course focuses on all the key pension topics including an overview of the benefits, changes and the financial implications of pension planning.

Aimed at

This course is aimed at employees of all grades and ages.

Learning objectives

- Explore key financial planning issues specific to pension planning in the workplace
- Understand the key principles of pensions and tax relief
- Learn about workplace pensions and the benefits that are available to employees
- Be aware of what the State Pension can provide and when
- Encourage personal responsibility for financial security
- Gain greater confidence in financial matters through increased financial knowledge
- Understand the next steps and where to receive further guidance and regulated financial advice

Course structure

Your retirement savings

- Your retirement savings
- Making sufficient savings
- Sources of income in retirement
- Explaining the State Pension
- State Pension eligibility

Workplace pensions

- Defined Benefit schemes
- Defined Contribution schemes
- Tax implications
- Tax allowances

Employer specific workplace pension

- Explanation of the scheme(s)
- Options at retirement
- Impact of early retirement
- Options for increasing benefits
- Options on how to receive your pension(s)