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**True Bearing Chartered**

**PREPARING FOR RETIREMENT WORKSHOP**

**AGENDA**

**9.15 am Arrival**

9.30 am Introduction & Learning Reps Wanted

9.45 am Managing Change

* Psychological changes
* Emotional upheaval
* Relationships
* New interests & hobbies

**10.15 am Mid-Morning Tea/Coffee Break**

10.30 am Occupational Pensions

* What is your pensions benefit
* Calculation of work pension

11.30 am True Bearing Chartered Independent Financial Advice

* True Bearing financial advice approach
* Risk Vs. Reward
* Accessibility
* Inflation
* Income & Growth

**12.15 am LUNCH**

12.45 pm True Bearing Chartered Independent Financial Advice

* Taxation
* Investment advice
* IFA & Wealth Management

13.30 pm Legal Services Guild

* Wills & Trusts
* Protection & Assets

**14.30 pm Afternoon Tea/Coffee Break**

14.45 pm Benefits provided by the State

* Job seekers allowances
* Statutory State Pension
* National Insurance considerations
* Other welfare benefits

15.45 pm Retired Members Scheme

**16.15 pm Evaluation & CLOSE**