Insurance Institute of India, COI, Kolkata

Classroom Training Session on Comprehensive Financial Solution for Retirement (CT) (Program ID: CPC) 16th December, 2025

Program Concept and Objectives: Retirement is one of the important phase of our lives. From both a personal and financial perspective, realizing the important goal of a comfortable retirement is an incredibly extensive process that takes sensible planning and sustained preparation during one's working years.

While all of us dream of a comfortable retirement, the complexity and time required to build a retirement corpus can make the whole process seem intimidating. All the same, this important activity cannot be procrastinated if one want to have a peaceful retired life, free from financial worries.

There is a comprehensive pension system. There are various types of pension schemes although these are broadly categorized as Defined contribution schemes or defined benefit schemes. Out of this most popular in the present day scenario are defined contributory schemes.

There are two phases in creating pension / annuity as a retirement solution. There are accumulation phase and pay-out phase. During the accumulation phase one has to contribute to the pension corpus till the date of vesting say at the age of 60 or 62. From the vesting date one will get pay-outs as pension / annuity monthly. There are number of pension products in the market to enable a person to do retirement planning and have a pension facility during the retired phase of the life. The various financial instruments and mutual funds will also enable one to invest the corpus gainfully to grow it till vesting date.

The object of this program is to discuss about the retirement planning with specific emphasis on various pension plans available in the market and their utility in retirement planning including National Pension Scheme. The tax benefits available for contributions to various pension funds will also be discussed.

The significance of pension planning and pension products vis-Ã -vis retirement planning will have focus in the program.

Key Takeaways from the Program:

- Personal Financial Planning
- Retirement Planning
- Pension/Annuity Plans
- Immediate and Deferred Annuity Plans
- Types of Annuity Options
- Actuarial aspects relating to Pension Schemes
- Ulips & SWPS

Participant Profile Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.

Program Fees:

- Non-residential participants: Total amount Required – Rs. 2950/- i.e. (Rs. 2500/- plus 9% CGST + 9% SGST).
  - (The fees cover tuition, course material and day boarding (i.e. breakfast, lunch and tea/coffee during tea breaks for actual days of training).)

Program Date: 16th December 2025 **Program Duration:** 1 day (CT) **Program Time (IST):** 10 AM to 05.30 PM (6 Hrs.)

PROGRAM VENUE:

College of Insurance, Insurance Institute of India,
2nd Floor – 2A & 2C, CBD/1,
Synthesis Business Park, Action Area II,
Newtown, Kolkata – 700 156.
Or
Please click below link for Training Venue
Click Here

Ms. Nilambari Bagde	Any help/queries mail to college_insurance@iii.org.in	022-69654234
Ms. Yogeeta Kulkarni		022-69654255
Mr. A. G. Madwal		022-69654254
Mr. P. H. Ekke		022-69654284
Ms. Akshara Nagpal		022-69654266
Ms. Meghana Shivtarkar		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

REGISTER NOW!

www.insuranceinstituteofindia.com