

# Insurance Institute of India, College of Insurance, Mumbai

## Virtual Training Session on Pensions and Retirement Solutions (CVT) - 7<sup>th</sup> July, 2025

### Program Concept and Objectives:

Retirement is one of the important phases 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 wants to have a peaceful retired life, free from financial worries.

There are two phases in creating pension / annuity as a retirement solution. These are accumulation phase and payout 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 pension / annuity as per chosen frequency. There are many 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. Different financial instruments and mutual funds will also enable one to invest the corpus gainfully to grow it till vesting date. Therefore, one needs to have good knowledge of all these for effectively planning for retirement either for self or for the client.

COI has created '**Virtual Training (CVT) Rooms**' as a cost-effective mechanism for participants to equip themselves academically at their respective locations

### Key Takeaways of the program:

- Discussion 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-à-vis retirement planning will have focus in the program.

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

Duration	Date	Time (IST)	Hours
One Day (CVT)	7 <sup>th</sup> July 2025	10.30 hrs. - 1.30 hrs.	3 Hours

**Program Fees:** ₹ 1770/- (₹ 1500/- plus 18% GST)

**Program Coordinator:** Dr Ramesh Kumar Satuluri (Email: [ramesh@iii.org.in](mailto:ramesh@iii.org.in) , Contact No: 022-69654263)

**How to enroll:** [Click here for Registration](#) and for any help/queries please mail to [college\\_insurance@iii.org.in](mailto:college_insurance@iii.org.in).

**Certificate of Participation:** Online Certificate in PDF format will be issued to all the participants.

Program ID : CPC

### Program Team:

**PROGRAM VENUE:**  
College of Insurance  
Insurance Institute of India,  
Plot No. C-46, G-Block,  
Bandra-Kurla Complex,  
Mumbai - 400 051.

Please follow the link /scan  
QR Code for training venue



<https://qr.go.page.link/qs2Qb>

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