

Virtual Training Session on Financial Planning and Retirement Solutions

Program ID- CPL35 (On 3rd August, 2023)

Retirement is one of the important phases of our lives. From personal as well as financial perspective, realizing the important goal of a comfortable retirement is a 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 upon if one want to have a peaceful retired life, free from financial worries.

There are various types of pension schemes which are broadly categorized as Defined contribution schemes or defined benefit schemes. Out of this the most relevant and feasible schemes in the present day scenario are defined contributory schemes.

There are two phases in creating pension / annuity as a retirement solution. They are accumulation phase and pay-out phase. During the accumulation phase one has to contribute to the pension corpus till the chosen date of vesting, say at the age of 60. 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.

COI has created '**Virtual Training (CVT) Rooms**' to conduct training program in a cost-effective manner for participants to equip themselves academically at their respective locations.

Program Objectives: The object of this three hour virtual 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 comparison with National Pension Scheme. The tax benefits available for contributions to various pension funds will also be discussed. This program aims to equip participants with reasonable knowledge to assist their customers in retirement planning and also helpful in planning their own retirement.

Program Contents:

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

Participants Profile: Marketing executives, HR executives working Insurance Companies, Corporate Agents, Brokers and any Individual interested to learn about Pension Products and Retirement Planning.

Duration	Date	Time (IST)	Hours
One Day	3 rd August 2023	10.00 hrs. - 13.00 hrs.	3 Hours

Course Fees: Rs. 1770/- (Rs.1500/- + 9% CGST + 9% SGST)

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

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

Programme Coordinator:

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For enrolment and technical support call	Mr. Vivek Rane	022-26544297	Ms Vrushali Nagawekar	022-26544266
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