



Life Planning for Retirement

Planning for retirement is even more important today than it has ever been. Retirees are much healthier, much more active and can expect to live much longer – a whole new phase of life and opportunity is opening up. In addition, the removal of the Default Retirement Age has meant that the decision when to retire is now in our own hands.

This one-day workshop prepares you for a successful transition into retirement by addressing key areas of concern with realistic strategies.

Who Should Attend This Course?

Anyone who is interested in having a meaningful retirement whether you are near the end of your current career or at the beginning.

This workshop will address the following:

- Can I afford to retire?
- Risk management
- Investment planning after retirement
- Tax Planning after retirement.
- Legal considerations
- Estate Planning (process of arranging and planning your succession and financial affairs).

Trainer Profile

Mr. Jomon Joseph, M.Com, MBA,CPFA, is an Investment Strategist providing Investment Research and Financial Planning Services to individuals and corporate, specializing in the areas of Investment Research, Investment Strategies, Advanced Excel Modeling, Business Analysis and Financial Planning. He has extensive experience in the financial service sector and was associated with Sykes & Ray Equities (I) Ltd., Mumbai, served as the Head of Fundamental Research. He has conducted several training programs for Investors, Management Institutes and Corporates across India. He is the visiting faculty for various management institutes in India and the First SEBI Registered Investment Advisor from Kerala. ♣ At present, he is the promoter of The Strategist Cochin, ♣ Resident Director of CONTROL& APPLICATIONS AUTOMATION ABU DHABI, ♣ Centre Head of Financial Planning Academy Mumbai, ♣Microsoft Certified Excel Specialist.

We are keen to collaborate with your organization for adding substantial value to your human resources.

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