

Golden years

All about Retirement Planning



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AGENDA

Context Setting ~30 Min

- Introduction
- Key Elements
 - Health Care
 - Longevity
 - Interest Rates
 - Inflation
- Next few years
 - Repatriation of funds
 - Inheritance Tax
- Investment Return Vs. Investor Return

Core Topics ~60 Min

- ASSETS
- LIABILITIES
- INCOME
- EXPENSES
- CASH FLOWS
- LIFE STYLE
- Liquidity
- RISK OF LIVING LONG / ALONE
- Estate Planning

Experiences ~60 Min

- Real Estate
- Equity Markets
- Investing in Debt
- Gold and Commodities
- Trust Vs. Will
- Financial Assets
- Credit Cards
- Bucket Strategy

GOOD TIME TO REVISIT

