

Course Prospectus

The Future of Retirement Planning

- Financial and Non-Financial Considerations for FARs

Course structure:

- 3 CPD Hour
- 3.5 hours of interactive learning

Learning objectives and desired outcomes:

Upon completion of the course, FARs can better examine their assumptions and start to play a vital role in retirement planning for their clients

- Re-examine assumptions used for retirement planning
- Confront the brutal truth of unpreparedness
- Consider the future of work in the planning
- Understand the value of earned income
- Enjoy Healthy, Wealthy, Useful and happy Life

Course Outline:

Introduction:

- On the same page: define 'retirement'
- The history of retirement
- The trend in retirement related aspects
- Future proof your retirement
- Final Analysis

The history of retirement

- how long is the history of retirement?
- How it all started?
- It's impact/influence on us?
- What has changed since then?
- Is it still applicable? Or practical?
- What are our options?
- Other aspects...

The trend in retirement related aspects (1 hr 15mins)

- The trend in life expectancy
- Silver Tsunami or Golden Age?
- The trend in investment returns under pension funds
- The trend in employment
- The trend in spending
- The trend in elderly friendly technology

- The trend in healthcare
- The trend in housing
- The trend in lifestyle choices
- The trend in elderly related illnesses
- Other trends

Future proof your retirement (1 hr 30mins)

- normal & new normal
- Know Your own 4 Life:
- different planning models and it's implications
- Which model suits you best - 3 questions?
- When is the future?
- Working the numbers
- Future proofing with action steps
- Other aspects

Final Analysis