



*Training Course:  
Retirement Planning Workshop*

*5 - 9 August 2024  
Cape Town (South Africa)  
DoubleTree by Hilton Cape Town - Upper Eastside*

## Training Course: Retirement Planning Workshop

Training Course code: SC235142 From: 5 - 9 August 2024 Venue: Cape Town (South Africa) - DoubleTree by Hilton Cape Town - Upper Eastside Training Course Fees: 6545 € Euro

### Introduction:

The Retirement Planning Workshop is designed to equip participants with the knowledge and skills necessary to plan for a secure and fulfilling retirement. In today's dynamic financial landscape, retirement planning has become more crucial than ever. This comprehensive program will empower participants to make informed decisions, set financial goals, and create a retirement roadmap tailored to their individual needs.

### Objectives:

By the end of this workshop, participants will be able to:

- Understand the importance of retirement planning and its impact on financial security.
- Define their retirement goals and aspirations.
- Assess their current financial situation and retirement readiness.
- Develop a personalized retirement savings and investment strategy.
- Navigate government retirement benefits and pension plans.
- Plan for healthcare and insurance needs in retirement.
- Create a realistic budget for their retirement lifestyle.
- Implement strategies to minimize taxation in retirement.
- Address estate planning and legacy considerations.

### Target Audience:

This program is suitable for:

- Individuals approaching retirement age typically 50 and above.
- Employees seeking to maximize their workplace retirement benefits.
- Self-employed individuals and business owners preparing for retirement.
- Financial advisors and professionals looking to enhance their retirement planning expertise.

## Outlines:

### Day 1:

#### Understanding Retirement Planning Basics

- Introduction to retirement planning
- Importance of early planning
- Setting retirement goals and expectations
- Assessing current financial status

### Day 2:

#### Investment and Savings Strategies

- Types of retirement accounts e.g., 401k, IRA
- Asset allocation and diversification
- Investment options and risk management
- Maximizing employer retirement benefits

### Day 3:

#### Government Benefits and Pension Plans

- Social Security and Medicare
- Pensions and annuities
- Understanding government regulations and eligibility
- Strategies for optimizing government benefits

### Day 4:

#### Healthcare and Insurance in Retirement

- Healthcare costs in retirement
- Medicare coverage and options
- Long-term care insurance
- Planning for healthcare expenses



Day 5:

Taxation, Estate Planning, and Legacy

- Tax-efficient retirement strategies
- Estate planning essentials
- Leaving a legacy
- Finalizing your retirement plan

## Registration form on the Training Course: Retirement Planning Workshop

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

### Delegate Information

Full Name (Mr / Ms / Dr / Eng): .....

Position: .....

Telephone / Mobile: .....

Personal E-Mail: .....

Official E-Mail: .....

### Company Information

Company Name: .....

Address: .....

City / Country: .....

### Person Responsible for Training and Development

Full Name (Mr / Ms / Dr / Eng): .....

Position: .....

Telephone / Mobile: .....

Personal E-Mail: .....

Official E-Mail: .....

### Payment Method

- Please find enclosed a cheque made payable to Global Horizon
- Please invoice me
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### Easy Ways To Register

Telephone:  
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