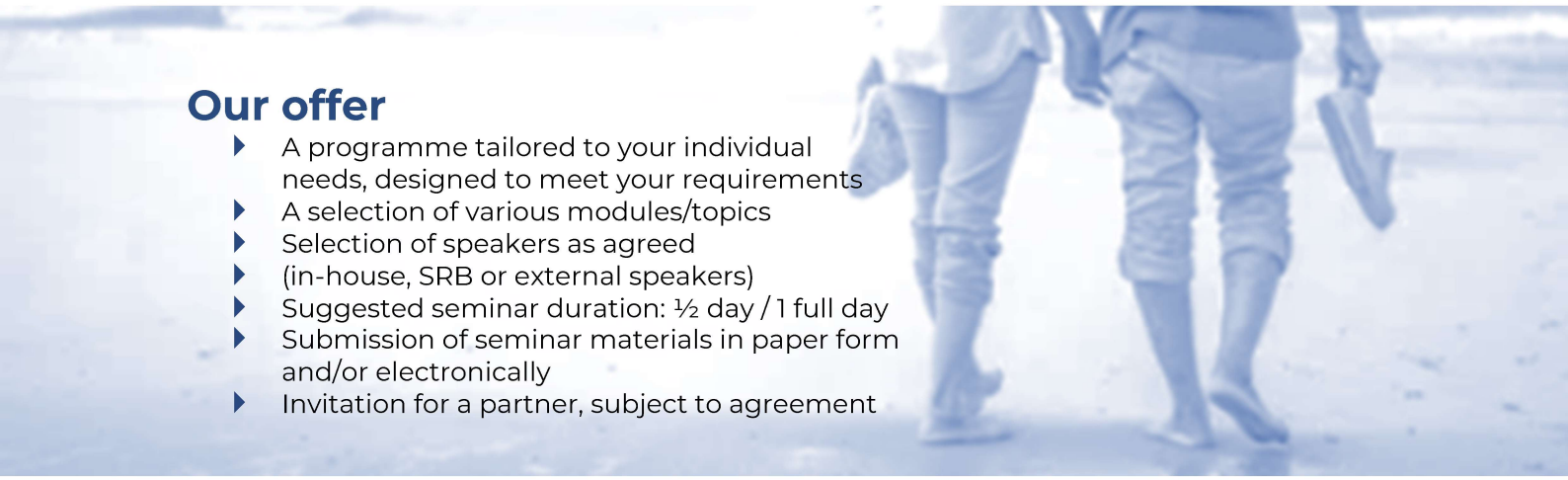



# Preparatory seminar on retirement

There is a great deal of anticipation. At the same time, the transition into the third stage of life is often fraught with uncertainty, and many questions remain unanswered. This seminar is designed to prepare staff for their upcoming retirement.

The seminar, which can be tailored to individual needs, is designed to support participants, answer their questions and allay their concerns. It serves as a guide to financial matters and provides valuable tips and advice from experts on how to shape the next stage of their lives.



## Our offer

- A programme tailored to your individual needs, designed to meet your requirements
- A selection of various modules/topics
- Selection of speakers as agreed
- (in-house, SRB or external speakers)
- Suggested seminar duration: ½ day / 1 full day
- Submission of seminar materials in paper form and/or electronically
- Invitation for a partner, subject to agreement

## Optional modules / Topics

### The many possibilities of retirement

- Early retirement, normal retirement, deferred retirement, partial retirement
- Pension payments, lump-sum payments, hybrid options
- Gathering of information by the insured person

### The 1st pillar: AHV

- Eligibility criteria for the AHV pension
- Timing of the AHV pension
- Amount of the AHV pension

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## The 2nd pillar: occupational pension provision

- Retirement benefits – lump-sum option & pension calculation
- Detailed retirement process

## The third pillar: financial planning and taxation

- 3a and 3b savings schemes on retirement
- Taxation of capital, tax optimisation, tax matters
- Budget, financial planning

## Matrimonial and Inheritance Law

- Estate planning, lasting power of attorney, will
- Legal capacity – guardianship – legal representation
  General questions regarding inheritance

## Health and Prevention

- Health and vitality
- Living Will
- Illnesses and medical diagnoses in old age

## Coping and changes in old age

- a new chapter in life
- planning for the future, both individually and together
- Organising daily life
- Changes in the network of relationships
- Time management
- Possible factors contributing to a fulfilling life in old age

## Contact / Quotes

- The SRB would be happy to provide you with a tailor-made quote. Mr Martin Meili, from the BVG Competence Centre, will be happy to assist you with this (martin.meili@srb.ch or 044 497 87 24).

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