

Are you financially on track for retirement?

Overview/Description

One of the top financial goals for individuals and couples is to be financially secure in retirement. This goal is not one that can be planned for in just the last few years leading up to the planned retirement date, but must be set and have milestones identified throughout the different stages of life. There are many “rules of thumb” or theories on the proper amount and type of savings and investments one should have in setting aside money for retirement, but in reality, there is not one plan or solution that fits everyone.

Target Audience

All individuals seeking to develop a customized financial strategy for identifying a savings and investment plan that corresponds to their own vision of retirement.

Expected Duration

45-60 minutes

Workshop Objectives

At the end of the workshop, you will be able to:

- Understand the importance of establishing a specific, measurable retirement financial plan
- Determine if you are on track to reach the retirement target you have set
- Recognize the tax advantaged savings plans available to you and the types of savings and investment vehicles within these plans
- Have a clearer understanding of how your vision of retirement living corresponds to your financial position during this life stage