

University of Bath
Pre-retirement seminar

09:30	Welcome
09:45	USS and LPGS scheme overviews Features and Benefits of your occupation pension scheme
10:30	Break
10:45	Financial Planning (Part 1) <ul style="list-style-type: none">• Making a good pension choice• Taxation in retirement• Wills and Power of Attorney
11:45	Financial Planning (Part 2) <ul style="list-style-type: none">• Inflation and Longevity• Investment Strategies• Planning your estate
12:45	Lunch
13:30	State pension Overview of State benefits and qualifying criteria
14:15	Life impact of retirement <ul style="list-style-type: none">• What does retirement mean to you• Short, medium and long term plans
15:15	Break
15:30	Wellbeing <ul style="list-style-type: none">• Hopes and concerns for retirement• Planning positive transition from working life
16:00	Course overview and evaluation