



College of Insurance

Insurance Institute of India, Kolkata

Classroom Training Session on Financial Planning for Golden Years (Retirement) (CT-FPGY)

(On: 23rd September, 2024)

Program Concept and Objectives:

Retirement is one of the important phases of our lives. While all of us dream of a comfortable retirement, the complexity and time required to build a retirement corpus can make the whole process seem intimidating. All the same, this important activity cannot be procrastinated if one wants to have a peaceful retired life, free from financial worries. There are two phases in creating pension / annuity as a retirement solution. There is an accumulation phase which is followed by a pay-out phase. During the accumulation phase one has to contribute to the pension corpus till the date of vesting say at the age of 60 or 62. From the vesting date one will get pay-outs as pension / annuity monthly. Various financial products provided by Life Insurance Companies, banks and mutual funds enable one to invest the corpus gainfully to grow it till vesting date.

Keeping the above backdrop in view, the College of Insurance has designed this one day program to discuss about the retirement planning with specific emphasis on various pension plans available in the market and their utility in retirement planning including National Pension Scheme. The tax benefits available for contributions to various pension funds will also be discussed. The significance of pension planning and pension products vis-à-vis retirement planning will have focus in the program.

Key Takeaways from the Program:

The participants of this program will get the knowledge and insights into the following

- Personal Financial Planning
- Retirement Planning
- Pension/Annuity Plans
- Immediate and Deferred Annuity Plans
- Types of Annuity Options
- Actuarial aspects relating to Pension Schemes

Participant Profile:

Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.



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Program Coordinator:

Mr Judhajit Sen, Faculty

Email: j.sen@iii.org.in

Program Duration & Timing:

1 day & from 10.00 a.m. to 05.00 p.m.

Program Fees:

- **Non-residential participants:** Total amount Required –Rs. 2950/- i.e. (Rs. 2500/- plus 9% CGST + 9% SGST).

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

Payment Terms and Conditions:

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.
- 3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Branch - Fort Branch Address - Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai - 400001.

- 4) For online payment mode by following the below link

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2110



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Program Venue, Location and Parking:

Please follow below link for Training Venue

<https://www.google.com/maps/place/Synthesis+Business+Park/@22.599688,88.47241,13z/data=!4m5!3m4!1s0x0:0xec3dd61dcbaa87f5!8m2!3d22.5996878!4d88.4724099?hl=en-US>

Address:

Insurance Institute of India
2nd Floor – 2A & 2C,
CBD/1, Synthesis Business Park,
Action Area II, Newtown,
Kolkata – 700 156.



Parking Facility: "Limited Parking Facilities are available"

Program Team:

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