SERVANTS OF ALL YET OF NONE

NEW SOUTH WALES
BAR ASSOCIATION

Financial strategies and planning for retirement

Presented by:

Kate McCallum& Tony Clark

Multiforte Financial Services

Chair:

TBC

NSW Bar Association

Common Room

5.15pm Wednesday

22 April 2015

1.5 HOUR SEMINAR
1.5 CPD POINTS IN THE MANAGEMENT STRAND

In this seminar, we will focus on the strategies you should be aware of to help set up your finances so that you can plan to live a long and healthy life beyond work – without worrying about having sufficient money. Importantly, we will explore the key risks that face individuals today beyond investment market risk.

Learning objectives

- Examine the five key retirement risks for individuals transitioning to flexible work or retirement, and how to address them.
- Clarify how much money you may need for the lifestyle you want.
- Understand implications for keeping versus downsizing your family home.
- Assess tax-effective superannuation and pension strategies.

THIS SEMINAR IS OPEN TO MEMBERS OF THE NSW BAR ASSOCIATION

REGISTRATION IS NOT REQUIRED

For more information, please contact Bali Kaur
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