

Financial planning

P&N Financial Planning Pre-Retirement Seminar (Half Day)

About the course

This pre-retirement seminar will be hosted by Karen Speldewinde, Nick Ferguson and Shelley Tiet who are all financial planners from P&N Financial Planning.

A lunch will be provided after this half day event and Karen, Shelley and Nick will be available to answer any personal questions you may have and to book appointments for those who would like a more detailed discussion about their retirement plans or review of their financial situation.

P&N Bank will also have Personal Lending representatives attending, to walk you through how to fast track the clearance of your mortgage before retirement. They will also be available to answer any questions you may have and book appointments.

Please register individually if attending with your partner.

Date

Tuesday 6 October 2020

Time

9.30 am - 1.15pm

Light lunch provided at 1pm

Cost

Nil: Members only

Facilitator

Police and Nurses Financial Planning

Nominated Audience

All SSTUWA members and partners

Venue

State School Teachers' Union of WA
1 West Street
West Perth WA 6005
(08) 9210 6035

Outcomes

The following topics will be covered:

1. Introduction to Financial Planning and the Benefits of Good Advice.
2. The Ever-changing Super Rules.
3. Your Super.....GESB
Goldstate, West State and GESB Super.
4. Centrelink, Newstart and other allowances
"What benefits may I be entitled to"?
5. Pre-retirement Planning Strategies
Options for those 60 years of age and above, including Transition to Retirement with working examples.
6. Portfolio Construction and Review
7. Summary, Q&A, and Closing

Police & Nurses Financial Planning Pty Ltd
AFSL 237507



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Tuesday 6 October 2020

Given name: _____ Surname: _____

Union ID no: _____ School/workplace: _____

Phone: _____ Mobile: _____

Email: _____

Send completed form to

SSTUWA Education and Training Centre

Email: training@sstuwa.org.au

Or register online at sstuwa.org.au

Please note: All courses are run subject to minimum booking numbers.

