

Complimentary Planning for Retirement Webinar for SLS members

Wednesday 12 May 2021 3.00pm – 4.30pm

Dear Colleague

I am pleased to advise you that our appointed Financial Advisers, Lighthouse Financial Advice, are organising a Planning for Retirement webinar.

There will be a presentation from John Brown from Lighthouse Financial Advice, to include *investments and money management* with commentary from Neil Shaw SLS Field Officer.

These matters will be of value to **all members of the Senior Management Team**, including those in the early stage of their careers, as the earlier the planning, the greater the benefits.

You should attend this webinar if you would like to understand:

How your pensions, including the **State and the Teachers' Pension Scheme**, work, when you can take them and how much you can expect to receive

Your options for accessing any additional pension savings, including from previous employers

Ways you may be able to increase your income

Tax considerations, including your tax-free lump sum

Countering inflation: will your income keep its value in real terms?

Planning for later life, including paying for long term care and passing on more to your loved ones

The webinar is provided free of charge and will be invaluable to you in planning your retirement. The sooner you plan the more financially secure it will be.

To book your place please email Lisa.Barratt@Quilter.com or call 01273 523707

If this date isn't convenient, please get in touch with Lisa, she will be happy to arrange an alternative convenient personal telephone consultation for you.

WHERE: Log in conveniently from your personal computer or device

Yours sincerely

Neil Shaw

Neil Shaw Field Officer

The value of your investments can go down as well as up, so you could get back less than you invested. A pension is a long-term investment. The fund value may fluctuate and can go down. Your eventual income may depend upon the size of the fund at retirement, future interest rates and tax legislation. Tax advice which contains no investment element is not regulated by the Financial Conduct Authority.

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