

Planning for Retirement with Oak Tree Financial Training



Who should attend?

This course is designed for staff who are looking to retire within the next 10 years.

What will I get out of attending?

This course will guide you through the financial complexities of retirement in a clear jargon-free presentation. You will cover the financial implications of retirement including:

- State pensions and allowances
- Company pensions
- Investments and savings
- Insurance and other benefits
- Wealth preservation
- Wills and Succession
- Planning long term care and inheritance tax

Course Dates

York Hospital Social Club
9.30am to 1pm

- **1st July** 2014
- **2nd September** 2014
- **17th November** 2014

Course Booking:

To book onto this course, please complete a fast track learning leave form and email it to :

CLAD.York@york.nhs.uk

For any queries please contact us on **01904 72 5219**.