1. Definition of retirement planning

2. Retirement timeline
a. 3 stages of retirement and longevity risks

3. Retirement income capital calculation
a. H.A.L.E.

4. Business assets and retirement plans
a. Risk of Section 216 of the Companies Act 1967

FAMILY BUSINESS OWNER & RETIREMENT PLANNING - AN ELECTIVE PROGRAMME UNDER CEPA

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5. Professional Donee
a. Why choose a professional
b. How to prepare

6. Lasting Power of Attorney
a. What is the process
b. When do people use Form 1 or Form 2
c. Where to begin

7. Case studies

8. Assignment – To be completed one month after the class