

# 2024 Member Pension Education Series



January		February	March	
<b>GROW PHASE</b>	<b>BEGIN PHASE</b>	<b>BEGIN PHASE</b>	<b>GROW PHASE</b>	
Topic: New Year, New You - Pension Basics <i>Good for: Members looking to kick off the new year by optimising their pension savings</i>		Topic: Why join your pension plan? <i>Good for: Anyone not in the plan yet</i>	Topic: Pension Basics - Deferred Members <i>Good for: Former plan members who have left their company or country with savings still invested</i>	
April		May	June	
<b>HARVEST PHASE</b>		<b>GROW PHASE</b>	<b>TRENDING TOPIC</b>	
Topic: Getting Ready for Life After Work: Making the Most of Your Savings <i>Good for: Members retiring within 10/12 years</i>		Topic: Understanding your Investment Choices (incl ESG) <i>Good for: Members interested in the long-term nature of pension investments &amp; a discussion on market volatility</i>	Topic: Gender Pension Parity <i>Good for: Members looking to understand more about the gender pension gap.</i>	
July	August		September	
<b>BEGIN PHASE</b>	<b>HARVEST PHASE</b>		<b>GROW PHASE</b>	<b>HARVEST PHASE</b>
Topic 1: Why join your pension plan? <i>Good for: Anyone not in the plan yet</i>	Topic: Getting Ready for Life After Work: Making the Most of Your Money <i>Good for: Members retiring within 5 years</i>		Topic: Revenue Deadline AVCs <i>Good for: Members looking to make one-off AVCs for tax relief before the Revenue deadline</i>	
October	November	December		
<b>BEGIN PHASE</b>	<b>HARVEST PHASE</b>	<b>GROW PHASE</b>		
Topic 1: Why join your pension plan? <i>Good for: Anyone not in the plan yet</i>	Topic: Getting Ready for Life After Work: A Holistic Focus <i>Good for: Members (age 60+) looking to learn more about the non-financial side to retirement</i>	Topic: Pensions 101 *AVC-Only Plans* <i>Good for: Members of AVC-Only pension plans (with a separate defined benefit pension)</i>		