



RETIRE EASY

Sample



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RELAX

E



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TRAVEL

Sample



INDEPENDENCE



READ



ENJOY



WHY PLAN FOR RETIREMENT INCOME?

- ABSENCE OF SOCIAL SECURITY SYSTEM
- INCREASED LIFE EXPECTANCY
- INDEPENDENT CHILDREN
- RISING MEDICAL COSTS
- INCREASED COST OF LIVING

Sample



TWO PHASES IN RETIREMENT PLANNING



**ACCUMULATION
PHASE**



**DISTRIBUTION
PHASE**

MFD Name | MFD Company Name | 9999999999

AMFI-Registered Mutual Fund Distributor

PLANNING RETIREMENT





ESTIMATE FUND REQUIREMENTS

STEP 1

- Estimate how much funds you require to live comfortably in your post-retirement years.*
- Calculate the amount to be received at the time of retirement (Gratuitous RR, Others).
- Anticipate the shortfall, if any.

*Remember to take into account aspects like increased medical cost, expenses & gifts for family & inflation.



START PLANNING EARLY

STEP 2

- Start saving early. Choose the right mix of debt, equity, govt / other asset classes.

- Ensure loans (if any) are paid during working years



TRACK AND REVIEW REGULARLY

STEP 3

- Track and review your plan at regular intervals and make sure that the plan meets the objectives

Sample



HAVE A
HAPPY RETIREMENT

Sample

