



Taking advantage of your pension tax allowances

Working together to be at our best to make a difference.

Introduction:

This workshop is designed to provide you with an overview of some of the key decisions to consider with your pensions.

Learning outcomes:

Financial education specialists **Affinity Connect** facilitate this interactive workshop:

- Maximise the opportunities for funding pensions
- Understand the potential issues with the Annual Allowance and tax free cash restriction
- Situations where these limits may be higher or lower
- Understand how the pension tax allowances are calculated
- Understand actions you can take

Who should attend?

Open to everyone. Aimed at those nearing retirement and want to further fund pensions. Aimed at higher earners who are looking to maximise their pension savings and tax relief opportunities or are concerned they may exceed the limits.

What you will need?

- In advance of the virtual workshop, you will be sent a diary invite. In this invite will be a declaration and the following statement: "By accepting this invite, you are demonstrating that you have read and understood the following declaration..." (leading into the declaration). You must therefore accept the invite prior to attending the workshop
- A willingness to learn and share experiences with others
- Writing materials for activities and taking notes

Booking information:

Check dates and availability on ESR

Workshop lead:

Affinity Connect

