

THE LIFECYCLE OF A PENSION

LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | AUGUST 2023



This webinar will look at a pension from a “cradle to grave” perspective and explore how flexible pensions can be throughout clients’ various life stages. It will also examine how tax efficient it can be to fund pensions and demonstrate what a pension can do for clients and their family besides simply providing a retirement income.

Following this session, the delegate should have an understanding of the following objectives and/or topics:

- How tax relief and PCLS combine to make pensions highly tax efficient investment vehicles.
- How pension contributions can be used as part of an integrated profit extraction model for shareholders/directors of limited companies.
- How employer pension contributions can be used to remove excessive cash from a business and the potential IHT and CGT benefits of doing so.
- Some of the benefits of purchasing a commercial property via a pension.
- Pension death benefit options at a high level.

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