

## **Eight-Hour Social Insurance and Retirement Workshop**

### **Session 1: Introduction to Social Insurance and Retirement (1 hour)**

- Overview of Social Insurance Programs
- Importance of Retirement Planning
- Key Challenges in Social Security and Retirement

### **Session 2: Social Security Systems (1 hour)**

- Understanding Social Security Programs
- Types of Social Insurance: Pension, Disability, and Survivor Benefits
- Eligibility Criteria and Enrollment Process

### **Session 3: Retirement Planning Basics (1 hour)**

- Basics of Retirement Planning
- Assessing Retirement Needs and Goals
- Saving and Investing for Retirement

### **Session 4: Pension Funds and Investment Management (1 hour)**

- Overview of Pension Funds
- Investment Strategies for Pension Funds
- Risk Management and Portfolio Diversification

### **Session 5: Retirement Income Options (1 hour)**

- Types of Retirement Income Sources: Social Security, Pensions, Savings
- Retirement Distribution Strategies
- Maximizing Retirement Income Benefits

### **Session 6: Healthcare and Long-Term Care Planning (1 hour)**

- Healthcare Costs in Retirement
- Long-Term Care Insurance Options
- Planning for Healthcare Expenses in Retirement

### **Session 7: Social Security Benefits and Claims (1 hour)**

- Understanding Social Security Benefits
- Applying for Social Security Benefits
- Maximizing Social Security Benefits

### **Session 8: Legal and Tax Considerations in Retirement (1 hour)**

- Legal Documents for Retirement Planning: Wills, Trusts, Powers of Attorney
- Tax Implications of Retirement Income

- Estate Planning and Wealth Transfer Strategies

Throughout the workshop, interactive discussions, case studies, and practical exercises will be used to engage participants and reinforce key concepts. Participants will leave with a comprehensive understanding of social insurance and retirement planning principles and practical strategies for securing their financial future.