



IPM Draper Financial Brokers Floor 1  
10 Stephen Street,  
Sligo  
F91 V2XR  
T: +353 (0) 71 9143742/ 9162595  
E: adrian@drapergroup.ie

## Pension Focus Points - Post Retirement

Whether you are near retirement or in retirement in an AMRF/ARF, Annuity or other form of retirement fund, the following are some important considerations:

- Have I the correct balance between my pension and other savings
- Has my personal/family situation changed since I retired
- Do I need to make provisions for inheritance tax
- Do I need to re organise my pension in any way
- Have I made a will, is it up to date and in line with my wishes
- Will my pension provide adequate income for my retirement
- Has my attitude to risk changed since I retired
- What are the pension implications if I continue to work
  
- Insert any other areas you wish clarification on below

---

---

---

If you tick the relevant boxes above, or insert any other items you require clarification on and return the questionnaire we will be happy to respond.