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Pension Focus Points - Pre Retirement

Whether you are in the early stages of your pension or close to retirement in either a PRSA, Personal Pension, Buy out Bond, Group Pension, Executive Pension or other 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 started my pension
- What needs to be done if I want to retire early
- Do I need to top up my pension to boost my retirement Income
- Am I getting the correct tax relief on my contributions
- Will my pension provide adequate income for my retirement
- Has my attitude to risk changed since I commenced my pension
- Am I in the best investment portfolio that meets my needs
- 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.