



BATIRENTE



Plannuity

Retirement Preparation
Support Services



**My retirement.
Our strength.**





Give life to your retirement projects

A successful transition to retirement involves **thought** and **preparation**. This is why Bâtirente has set up its Plannuity service to assist its members during **three key moments** in the final phase of their preparation for retirement.

1 A focus on your retirement objectives
Information sessions in the workplace

2 A successful transition to retirement
Retirement preparation workshop
with spouse

3 Retire with your mind at ease
Customized retirement income plan





Information session in the workplace

This information session allows participants to see if they are on track to meet their retirement needs. This session offers the opportunity to pause and reflect on your savings strategy and helps you get acquainted with the resources available to optimize your retirement income. It is mostly recommended for members aged fifty and over.



🕒 *This two-hour information session is generally given in the workplace.*

Members who wish to attend an information session in the workplace must communicate with their group representative.



Retirement preparation workshop with spouse



The transition to retirement is a major step in the life of a worker. Several points of reference will change: self-worth related to the job, the dynamics within the couple, social network, etc. It also raises some questions about health and the provisions to take to protect loved ones.

This workshop offers members and their spouses the opportunity to reflect on these topics with the guidance of professionals in law, health, career counselling and personal finance.

Moreover, for financial matters, a Bâtirente group-annuity advisor will detail the retirement benefits from the public pensions, the group membership plan and other possible sources of income. As well, the different options offered by Bâtirente to convert your savings into a regular retirement income will be discussed.

🕒 *This workshop is recommended to workers who are considering retiring within a few years. It lasts ten hours and is generally given over two days.*

Members who are interested in participating in a retirement preparation workshop are invited to contact their group representative.



Customized retirement income plan


Can I retire next year? In three years? Will I have enough money to fulfill my retirement projects? And what if I work part time?

When these questions come to mind, you can contact a Bâtirente advisor who can provide you with a customized decumulation plan for your retirement capital.

With information on your lifestyle, your retirement projects, the income from public pension plans and your other sources of income, the group-annuity advisors will evaluate with you different scenarios to structure your retirement income efficiently.

With this plan, you will be able to retire with your mind at ease.



 *The personalized retirement income plan is a free service intended for members who wish to retire within a few years.*

For more information or to make an appointment, contact us:

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Visit our website
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