

Assess my personal situation

- Confirm that I meet the pension criteria for retirement or early retirement.
- Get my documents together (education, career, pre- and post-retirement insurance, supplementary insurance, etc.).
- Complete all necessary procedures with the National Pension Insurance Fund (CNAP).
- Establish how much my pension will be.
- Decide how my pension payments will be made.
- Think about how I want to spend my time when I'm retired.
- Consider the option of moving to a retirement home in the future.



Secure my future

Get an expert to help me go over the options for saving and preparing to pass on my estate:

- On-demand savings account
- Supplementary pension insurance
- Term life insurance
- Endowment life insurance
- Life insurance
- Other options?



Tax concerns

Check my tax status based on:

- Tax return
- Annual statements

