

Event Diary – Spring Lunch & Talk on Apr 28, 2012

By Ivy Yan, FA71

(This article is also in Fall 2012 Newsletter)

Our Spring Lunch and Talk was successfully held on April 28, 2012. About 30 people attended.

Our own Roger Kwan, CGA, delivered very engaging talks on "How to prioritize RRSP, TFSA & RESP to achieve your financial goals and tax savings" and "How should baby boomers strategize their investments for a secured retirement".

Roger first explained the financial tools available for tax and financial planning and saving, the purpose of these tools, their advantages and disadvantages and, under different situations, how these tools should be prioritized as one approaches retirement.

After the delicious lunch, we then went through a couple of case studies, reviewing the financial situations of two couples. With a smaller audience, Roger was able to generate a very interactive and interesting dialogue with the audience. Under his facilitation, we identified the couples' characteristics and risks. In the midst of laughter and lively discussions, we gained helpful knowledge of the tools available, and the strategies we should adopt to secure a financially stable retirement.

On behalf of the Association, I wish to thank Roger for providing his expertise and insight in this area. I also wish to thank Jerry for providing the technical equipment and AV system, making the presentation that much more fun. The event was enjoyed by all.