

Life is full of twists and turns

Help your clients avoid any possible pitfalls of a windfall



There are a number of life changes that can impact retirement income – inheritance is a common one.



Cameron is a 67 year old homeowner with modest super and assets – until he receives a sizeable inheritance.

Before speaking to his financial adviser, he wonders if he should...



Spend some of the money renovating his house to hopefully increase the resale value.

Put a chunk of money in a term deposit and the rest in a high interest savings account so it will be safe – even if it does impact his Age Pension.

Revisit his retirement plan to take advantage of his increased retirement assets to build a sustainable lifetime income stream.

Even events like receiving an inheritance may upset the status quo for retirees. Contact your Challenger BDM to find out how a lifetime annuity could help a client like Cameron with guaranteed income to last a lifetime.

Other life changes that may impact retirement income



Change of relationship status
Managing the financial impact of an emotional event



Home downsizing
Moving to a smaller home shouldn't shrink your clients retirement income



Moving from part-time to full-time retirement
Stopping work doesn't need to stop your clients' income

Discover how investing in a lifetime annuity may help manage the impact of a life change on your clients' retirement income. **Book in a 1:1 session with a Challenger BDM to learn more.**

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