



Your Retirement, Planned.

*Understand, check and prepare
your retirement, guided by AI.*

10 prompts to understand, check, anticipate,
prepare and live your retirement with ease.

Free for the SYSTINFO community



GOOD TO KNOW

A guide, not an oracle.

Preparing for retirement without the stress: assistants like ChatGPT, Gemini or Le Chat decode a career statement, clear up the jargon and simulate a departure date. But AI knows neither your exact record nor the current rules. Three reflexes first.

- **AI is not your pension provider**

It does not know your exact record or the rules in force. Always check official sources (your national pension body and its website) and your own provider before acting.

- **Anonymize your sensitive data**

Never paste your social security number, full name or identifying amounts into an AI. Strip them out first and keep only the useful context.

- **A signpost, not financial advice**

AI clarifies, it does not decide your investments. For a binding money choice, talk to a pension adviser or a licensed professional.

The right reflex: AI explains and organizes, your provider and an adviser confirm the figures.
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THE METHOD

Five moves, ten prompts.

Preparing for retirement comes down to five moves: understand your statement, check your entitlements, anticipate your departure date, prepare the paperwork and budget, and plan your life after. Ten prompts, two per step.

Every prompt follows the same recipe: Role, Context, Task, Format. Copy the structure, change the brackets.

01 Understand

· 2 prompts

02 Check

· 2 prompts

03 Anticipate

· 2 prompts

04 Prepare

· 2 prompts

05 Live

· 2 prompts



The Statement Decoded

PROMPT TO COPY

Role: you are a pension adviser who explains simply.

Context: here is my anonymized career statement:

[paste the text], I am [age] and I worked as [jobs].

Task: explain what this statement really says.

Format: a clear summary (quarters or points earned, periods counted), what looks normal, what deserves a check, in plain language with no jargon.

What you get

A statement you can finally read. Understanding what you have built up, instead of enduring an opaque document, is the first step to preparing calmly for what comes next.



The Jargon Cleared Up

PROMPT TO COPY

Role: you are a patient retirement teacher.

Context: I keep stumbling on words in my statement and

letters: [list the terms], and I know nothing about them.

Task: explain each term with an example.

Format: a short definition per word (quarter, point, full rate, reduction, bonus, long career), a concrete example, and why it matters for me.

What you get

The language of retirement demystified. When the words are clear, you read your letters without dread and you ask your provider the right questions.



Entitlements Verified

PROMPT TO COPY

Role: you are a meticulous career checker.

Context: here is my anonymized statement: [paste it], and here is my real path: [jobs, years, countries].

Task: help me spot what is missing or wrong.

Format: a list of periods to verify (work, unemployment, illness, children, service), what seems absent, and the proof to dig up for each point.

What you get

The gaps become visible. A missing quarter caught early means a fairer pension: far better to fix things years ahead than at the very last moment.



The Error Reported

PROMPT TO COPY

Role: you are an assistant who writes clear letters.

Context: I found an error on my statement: [describe it], and I want it corrected.

Task: help me prepare my correction request.

Format: a polite, precise message to my provider, the documents to attach, the tone to keep, and a reminder to check the official procedure on my provider's site.

What you get

A claim ready to send. Reporting an error with the right proof and the right tone speeds up the fix and spares you pointless back-and-forth.



The Departure Date Simulated

PROMPT TO COPY

Role: you are an adviser who lays out the scenarios.

Context: I am [age], with [quarters or points], thinking of leaving around [date], here is my situation: [summary].

Task: compare several departure ages for me.

Format: a simple table (leave earlier, on time, later), the effect on the pension, the watch-points, and a reminder to confirm with my provider.

What you get

The scenarios laid flat. Seeing side by side what each departure date changes helps you decide with open eyes, rather than guessing in the dark.



The Gaps Filled

PROMPT TO COPY

Role: you are an adviser who knows the options.

Context: I am short of [periods or quarters] and I want to improve my future pension.

Task: explain the possible routes for me.

Format: the common options (buy-back, regularizing, work longer, combining), who each one is worth it for, the questions to ask, and confirm the cost with my provider.

What you get

The levers made clear. Knowing your options before you leave lets you act while there is still time, rather than regretting it afterwards.



The Departure Steps

PROMPT TO COPY

Role: you are a retirement departure organizer.

Context: I plan to leave on [date], I depend on [known schemes], and I want to forget nothing.

Task: build me a countdown of the steps.

Format: the steps month by month before departure, the documents to gather, who to notify (employer, providers), and a reminder to check the official deadlines.

What you get

A departure with no nasty surprise. A claim filed on time, with the right papers, avoids a pension gap between your last salary and your first payment.



The Retirement Budget

PROMPT TO COPY

Role: you are a kind budgeting adviser.

Context: my estimated pension will be around [amount], my current costs are [rent, groceries, and so on].

Task: help me build my retiree budget.

Format: a realistic monthly budget (income, fixed costs, leisure, unexpected), the items to adjust, and a safety margin, to refine with a professional.

What you get

A clear budget for later. Anticipating the drop in income before it hits gives you time to adjust gently, rather than facing a shock in month one.



The Life Project

PROMPT TO COPY

Role: you are a life-transition coach.

Context: I am retiring soon, I love [interests], and I fear [boredom, losing a sense of purpose].

Task: help me imagine my new life.

Format: concrete ideas (activities, weekly rhythm, projects, volunteering), a gentle way to start, and one question to help me find my direction.

What you get

A retirement with meaning. Preparing the life project as much as the numbers turns a dreaded empty space into a chosen, awaited new chapter.



The Bond Preserved

PROMPT TO COPY

Role: you are an adviser on ageing well.

Context: in retirement I want to keep a social bond and stay active, my situation is [alone, a couple, mobility].

Task: suggest ways for me to stay surrounded.

Format: options that fit (clubs, volunteering, small jobs, classes, neighbourhood), how to take the first step, and a reminder that bonds are built little by little.

What you get

Bonds that outlast work. Keeping contact and activity protects your mood and health: retirement is lived better surrounded than alone.



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