

INCOME PLANNING

7 STEPS TO YOUR RETIREMENT INCOME PLAN

Course Description

Close the gap!

The Income Planning course is designed to help you understand the elements necessary in creating a Retirement Income Plan by going through 7 simple steps.

Among your most critical financial planning decisions is the decision on how to generate income from your retirement portfolio. That income needs to last you a lifetime, yet surveys show that many people struggle with the difficult task of generating lifetime retirement income. Many retirees just withdraw what they need from their retirement savings without considering the impact this might have on ensuring their portfolio will last as long as they live.

We base the plan on the principles of conservative investing. Each of the 7 steps are designed to educate you on perceived and real retirement risks, the options you have for addressing your retirement income needs and potential solutions in the form of case studies.

This three-part course is designed to help your students understand the elements necessary to create a retirement income plan through seven simple steps. We base the plan on the principles of conservative investing.

Each step is designed to educate the student on:

- Perceived and real retirement risks
- The options they have for addressing their retirement income needs
- Potential solutions in the form of real-life case studies

A sampling of the topics covered includes:

- Unexpected risks
- Distribution options
- Leaving a legacy
- Bullet-proofing retirement assets from creditors

Course Instructors

Course instructors come from the financial services industry. They bring many years of experience to the classroom and enhance the course with “real world” examples of many of the principles being taught. This course is interactive and your participation is encouraged, but not required.

Communications with Instructor

The instructor is open for questions and inquiries about the material covered by the course and may be reached by telephone or email.