

3



3.3 CERTIFIED RETIREMENT COUNSELOR: COMPREHENSIVE CLASSROOM REVIEW

Why This Course?

“How can I be sure that our group has covered all the important points in the CRC curriculum?”

The 2½ day Comprehensive Workshop Review is designed to be a fast-paced, interactive program that reviews all the major learning points listed by InFRE as essential elements of the CRC curriculum.

The 20-hour program is a capstone program that is designed to serve as a general summary/review for those students who have already studied the course material on their own.

Who Should Participate

This program is most helpful to a group of individuals from the same organizations who want to review their learning and prepare for the Comprehensive Examination.

Instructional Formats

Two 8-hour sessions and a 4-hour session on the third day make up the Comprehensive Review. The workshop is facilitated by an experienced educator who holds the CRC designation as well as other designations in the retirement/financial services area.

The format of the workshop utilizes the CRC materials developed by InFRE. The host organization is responsible for providing an atmosphere conducive to the educational experience equipped with laptop and LCD projector capability and on-site technical support.

Benefits to the Students

- Opportunity to participate in an intensive review of material in preparation for the Comprehensive Examination
- Provides a benchmark that indicates on-going individual study culminating in the group review
- Reviews basic financial information necessary for retirement planning

Benefits to Your Organization

- Provide an intensive, efficient, cost-effective methods to enhance the success of individuals studying for the Comprehensive Examination
- Demonstrate a commitment to the organization’s ability to respond to enhanced career path opportunities for employees
- Encourages preparation of cohorts of employees to study for the designation

What Course Students Will Learn

- Practical application of the financial concepts and information learned in business and financial classes
- Opportunity to interact with the large group and the instructor by asking questions and discussing topics

Continuing Education Credits

See page 23 or visit www.infre.org for list of states and credits available.

Your Investment:

2½ day classroom delivery:

\$10,000 for up to 25 learners

\$150 each additional learner

Includes workbook

Insurance CE optional

Travel expenses additional

Certificate course licensing option:

Call for a quote