

## 2.2.2 CLASSROOM CERTIFICATE COURSE: FUNDAMENTALS OF RETIREMENT INVESTMENTS

### Why This Course?

***“Where can I get a basic overview of investments in general and their application to retirement planning?”***

The role of investments in retirement is twofold: an investment portfolio as well as a source of income. Beginning with a basic understanding of how the various asset classes and the diverse investments contained within them work, this course focuses on the application of investments to the goal of retirement across the life cycle.

### Who Should Participate

Individuals with little or no experience in investments will receive a broad overview of investments and be able to compare and contrast them as well as understand their use in specific retirement planning situations.

Experienced professionals will view the course as a review of the basics of investments and benefit from the emphasis on the use of investments in various retirement scenarios.,

### Instructional Formats

The course is available in a one-day classroom delivery format with a textbook.

### Benefits to the Advisors

- Gain practical knowledge and skills to address the growing number of clients interested in planning for retirement
- Gain a basic overview of the complexities of retirement planning and preparation across the lifespan

### Benefits to Your Organization

- Provide specialized counseling that addresses the needs for those planning for retirement as well as the already-retired
- Distinguish the organization as responsive to the complexity and need for retirement planning across the lifecycle
- Establish a cadre of trained professionals ready to address immediate needs of pre- and post-retirement clients

### What Course Participants Will Learn

- Basic knowledge of the organization and purpose of a retirement plan as part of the financial planning process
- Tools and strategies for budgeting, managing cash, and managing debt at various stages of retirement planning
- Identification of appropriate risk management and income tax planning strategies to maximize attainment of the retirement goals
- Fundamentals of estate planning at various stages of retirement planning and the role of basic estate planning documents
- Phases of retirement planning across the life cycle including the positive aspects, the challenges, and the important financial tasks to be undertaken at each stage
- Factors involved in pre and post-retirement counseling
- Methods for organizing financial information

### Continuing Education Credits

See page 23 or visit [www.infre.org](http://www.infre.org) for list of states and credits available.

### Your Investment:

*One-day classroom delivery:*

\$7,500 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