

2.2.3 CLASSROOM CERTIFICATE COURSE: FUNDAMENTALS OF RETIREMENT PLAN DESIGN

Why This Course?

“How do the various types of retirement plans contribute to retirement security for individuals?”

Retirement plans have long been regarded as the foundation of retirement security for most American workers. These plans are still critical components but individuals need to have a better understanding of the plans and how to use them to plan for retirement security.

Who Should Participate?

All retirement counselors need to be familiar with the variety of retirement plans available to their clients. The course includes a knowledge of how the plans work and their potential benefits. Whether an experienced financial professional or a newcomer to the field, a good working knowledge of qualified plans and their application is essential for retirement counselors.

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
- Develop a working knowledge of a variety of retirement plans and ways to maximize their effectiveness

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

- Knowledge of the unique qualities of various personal and corporate retirement plans
- Governmental regulations applicable to retirement plans
- Identify and describe the types of defined contribution and defined benefits plans]
- Distinguish among retirement plans in the private and public sectors
- Identify the types and forms of retirement distributions and their appropriate tax treatments
- Knowledge of current Social Security and Medicare regulations and their relationship to retirement plans

Continuing Education Credits

See page 23 or visit 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