

2.2 READY TO USE RESULTS-ORIENTED COURSES

2.2.1 CLASSROOM CERTIFICATE COURSE: FUNDAMENTALS OF RETIREMENT PLANNING

Why This Course?

“How can I learn the basics of working with people interested in planning retirement?”

With so many designations designed to prepare professionals to work with individuals focusing on retirement, the designation of Certified Retirement Counselor (CRC) leads the rest. This first part of the four-part course leading to the designation provides the basic information you need to help individuals plan for retirement regardless of where they are in their work career as well as if they are already retired.

Who Should Participate?

Any individual in the private or public sector who wants to increase competency in working with the growing retirement market should study Part I of the CRC curriculum. If you are interested in taking your general retirement planning knowledge to a deeper level, Fundamentals of Retirement Planning addresses retirement planning at all levels of the lifespan from beginning worker to the already-retired.

For the individual new to the profession of retirement counseling, this course provides a solid foundation. For an experienced professional, the course is a review of basic retirement planning principles.

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 investment concepts and their application
- Ability to identify asset classes and various investments in the classes
- Basic terminology used in portfolio construction and management
- Understanding of basic economic terms
- Ability to identify and distinguish among different economic cycles
- Identification of financial information resources
- Understanding of the application of various investments over the pre- and post-retirement life cycle

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