2.2.5 CLASSROOM CERTIFICATE COURSE: RETIREMENT READINESS AND COUNSELING

Why This Course?

"I need more background on retirement – not just the financial information. My clients are asking more questions about the non-financial components and I want to be ready to help them."

Retirement counseling is based on a multi-dimensional model with the financial component a significant one, albeit not the only one. This program provides an overview of the evolution of retirement to its present state as well as how it may look in the future. Information is drawn from an inter-disciplinary model including economics, gerontology, and life planning.

Who Should Participate?

Financial professionals will benefit from the Retirement Readiness and Counseling as they acquire additional skills in creating and maintaining relationships with retirement planning clients.

Non-financial professionals will learn a basic model from which they can launch discussions to help their clients examine a broad variety of issues related to retirement.

All individuals will learn the various non-financial factors that contribute to retirement decision making as well as increase and hone their relationship skills as they address the special needs of the client planning retirement.

Instructional Formats

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

Benefits to the Advisors

- Develop/increase personal communication skills that will surface special needs of retirement planning clients
- Gain a basic overview of the complexities of retirement planning and preparation across the lifespan
- Gain practical knowledge of the future directions of retirement and client needs

Benefits to Your Organization

- Provide specialized counseling that addresses the needs for those planning for retirement as well as the already-retired
- Complement existing training in the area of communication skills by focusing on the needs of the retirement client
- Distinguish the organization as responsive to the complexity and need for retirement planning across the life cycle
- Establish a cadre of trained professionals ready to address immediate needs of pre- and post-retirement clients

What Course Participants Will Learn

- Understand the changing nature of retirement and the increasingly complex issues associated with planning for it
- Identify their personal communication style and how to increase their repertoire of responses to meet the planning needs of a variety of clients
- Increase familiarity with a model to discuss the non-financial concerns involved in retirement planning

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