

2.2.4 CLASSROOM CERTIFICATE COURSE: STRATEGIES FOR MANAGING RETIREMENT INCOME INVESTMENTS

Why This Course?

“How can a retirement counselor provide appropriate retirement information to clients at various stages in retirement planning?”

Retirement counseling is based on a multi-dimensional model with the financial component a significant one, albeit not the only one. Using a model for retirement income in the post-retirement years, it becomes easier to understand the importance of considering a variety of non-financial factors when assisting in retirement planning. The retirement counseling is provided using the highest standards of ethics and behavior.

Who Should Participate

Financial professionals will benefit from the Retirement Income Management model that integrates an investment portfolio with an income stream.

Non-financial professionals will be presented with a model to help clients view their investments in a broader fashion.

All individuals will learn the various non-financial factors that contribute to retirement decision making as well as the ethical context in which the Counselor works.

Instructional Formats

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

Benefits to the Advisors

- Learn a practical retirement income management model that balances investment portfolio needs with an income stream
- 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

- Development of the concept and application of retirement models across the lifespan that includes
- Guidelines to project duration of assets
- Identification and management of retirement risks
- Identification of distribution, tax and estate issues and opportunities
- Identification of options to address income gaps
- Conversion of resources into income
- Guidelines for updating the retirement plan

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