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WHAT YOU'LL LEARN

A comprehensive overview of key issues and concepts facing adults approaching retirement. Over the course of two sessions, a Financial Educators Network instructor will guide learners through the information late-career individuals need to develop plans for a happy, healthy and secure retirement.



TOPICS INCLUDE:

LIFE PLANNING FOR RETIREMENT

- Preparing for the modern retirement system

RETIREMENT NEEDS & EXPENSES

- Ensuring your retirement plan will meet your requirements

POTENTIAL ROADBLOCKS & MISTAKES

- Avoiding waste and recognizing action areas

RETIREMENT INCOME SOURCES, INVESTMENTS & DISTRIBUTIONS

- Understanding your available options

RISK MANAGEMENT & ASSET PROTECTION

- Establishing a safe, healthy and secure retirement

ESTATE PLANNING

- Framing your family's future



Prepare for your future with confidence