



Build your retirement plan based on your needs, and your tolerance for risk!

Retirement Planning Course

A Classroom Course Teaching the Principles of Conservative Investing

An investing model developed for people ages 50 and up who would like an alternative to the typical Wall Street Myths to financial planning. Are you aware of and can you identify the hidden risks that Wall Street has in your portfolio?

During this course, you will learn what pitfalls to avoid and why. You will hear about financial tools and investments that you may already have or would like to have as part of your retirement plan. Upon completion of this course you will have the confidence you need to put your retirement plan into action.

If you are looking for answers to what happened to our financial markets, how they could have been avoided and what you could have done to limit the exposure you had to it, this course is for you. If you are concerned about your IRA, 401(k), 403(b) or other retirement accounts or maybe just want to be more confident in your current plan you should enroll, it will be time well spent.

Course Outline

Section 1: The Need for a New Model

The years of Pensions and Social Security are gone! Today, retiring seniors are forced to adapt to new rules which, in many cases, they have never played by in the past. Section 1 will cover ways to address these new rules and adjust to shifting paradigms and perspectives.

Section 2: The ABC Model of Investing

In Section 2, we will discuss the Color of Money... What is Yellow Money, Red Money, and Green Money, and what assets comprise them. You will learn how to allocate the proper assets to each category. We will discuss how the ABC Model can help you in Bull Markets and save you in Bear Markets.

Section 3: Retirement Planning Issues

This section will address your number one need in retirement... INCOME. You will learn how to plan to have enough and stay ahead of the inflation curve. For most Americans, their largest asset going into retirement is their 401(k), 403(b) or their IRA. In this section, we will go into great depth on how to preserve those accounts from the devastation of Taxes and Required Minimum Distribution (RMD).

Section 4: Making Your Own ABC Plan

In our final section you will learn how to create your own ABC Plan. We will discuss the planning process in great length, including the Seven Steps to Building Your ABC Plan. We will also discuss how to use the tools for planning that are in your workbook to make sure your plan is designed to suit your true needs.