Retirement Planning

Course Description:

Retirement Planning is the fifth course in the *ASM- Executive and Professional Education Center (EPEC)– Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program*. This course is a comprehensive study of personal and employee-sponsored retirement plans, familiarizing participants with methods of gathering information and selecting appropriate options to achieve the client's retirement goals.

Grading:

Successful completion of this course requires two elements: attendance at a minimum of 10 sessions of the live, instructor-led course sessions, and a passing score of 80% or better on the 25-question midterm and a passing score of 80% or better on the 25-question final exam.

Course Schedule:

The live, instructor led sessions meet every other Saturday from 8:00 AM – 12:00 PM. It is expected that the students participate in the online lessons for each program according to their pace and schedule, provided that their assignments are aligned with the discussion/review in the instructor led sessions.

Objectives:

By the end of this course, you will be proficient in the fundamentals of Retirement Planning. You will understand the basic differences between qualified and nonqualified plans and the differences between defined benefit and defined contribution plans. You will learn how to properly plan for retirement. You will also learn about Social Security and how it impacts retirement planning goals.

Prerequisites:

Fundamentals of Financial Planning
Insurance Planning
Investments Planning
Income Tax Planning

Lessons:

Lesson 1: Using IRAs to Build and Distribute More Retirement Income
Lesson 2: Qualified Plan Advantages and Disadvantages for Employees & Business Owners
Lesson 3: Employee Protections and Employer Responsibilities in Qualified Plans
Lesson 4: Understanding Types of Qualified Plans
Lesson 5: Leveraging Nonqualified Plans for Small Business and Not-for-Profit Employees & Owners
Retirement Planning Midterm Exam (25 Questions)

Lesson 6: Matching Business Owner Needs to the Right Qualified Plan
Lesson 7: Income Distribution Planning for Qualified Plans
Lesson 8: Fitting Deferred Compensation into the Retirement Plan
Lesson 9: Building Retirement Wealth by Maximizing Fringe Benefits
Lesson 10: Fundamentals of Social Security and Medicare
Retirement Planning Final Exam (25 Questions)

Textbook:

Title:	Retirement Planning
Publisher:	Keir Educational Resources
Edition/Year:	2016 Edition

Instructor:

Michael R Albillar, CFP®
Bio attached.