

Learning Objectives

Preparing for retirement can be challenging, as the future is fundamentally unknown. This course discusses retirement planning for both the known and unknown, enabling you to answer a client's "what-ifs" scenarios.

Upon completion of this course, participants will be able to:

- Identify maximum contributions to both traditional & Roth IRAs.
- Identify the specific provisions of the 10% penalty tax associated with early IRA withdrawals.
- Recognize specified 401(k) contribution rules.
- Recognize the entity which assumes the investment risks and rewards of cash balance pension plans.
- Calculate nominal yields.
- Recognize the basic purpose of investment diversification.
- Select the advantages of investing in mutual funds.
- Identify basic risk management techniques.
- Identify characteristics of specified types of life insurance.

This course will allow you to more easily advise those clients expressing an interest in enjoying a comfortable and fulfilling retirement.