

# Fast Track Retirement Planning



By  
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### **Learning Objectives**

After reading Chapter 1, participants will able to:

- 1.** Recognize the importance of personal retirement maps to suit client objectives & lifestyles and summarize the basic guidelines of retirement planning, including common pitfalls and misconceptions of retirement.
- 2.** Determine retirement using the major levels of retirement and key questions that have financial and personal ramifications.
- 3.** Identify retirement costs and income needs of clients based on their current budget, recognize tax savings strategies and identify guidelines when purchasing investment assets.