Fast Track Retirement Planning

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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.