RETIREMENT PLANNING IN TODAY'S ECONOMY

RETIREMENT
ELEVATED

WHY RETIREMENT ELEVATED?

Emerging Advisor offers complete retirement education courses designed BY advisors FOR advisors, with everything you need to conduct an exceptional educational classroom experience. Our flagship program, Retirement Planning in Today's Economy, will help you comfortably connect with your prospects in an educational setting. By utilizing the program, you can easily teach retirement planning concepts at a university in your area, while solidifying your position as a trusted advisor in the minds of attendees.

RETIREMENT PLANNING IN TODAY'S ECONOMY

is a comprehensive personal financial course designed to help explain retirement plans, prepare for market volatility, and budget strategically for the retirement they envision. Five topic presentation and results-driven introduction and closing modules.

COURSE PRESENTATION OPTIONS

- Multi-Day Course: 2 Evenings from 6:30pm – 9:00pm, or Saturday 9:00am – 1:00pm
- Single-Day Course: 1 evening from 6:30pm – 9:00pm, or Saturday 9:00am – 11:30am
- Recommended Venues: Universities, Colleges, Junior Colleges

TOPICS COVERED

- Income Planning
- Investment Planning
- Healthcare Planning
- Tax Planning
- Estate Planning

DEMOGRAPHIC

- Men and Women
- Ages 55 to 75

EACH COURSE INCLUDES

- Student Workbooks
- Supplemental Handouts
- Instructor Presentation and Training Guides
- Everything an Advisor Needs to Conduct a Successful Class

THE PROCESS

MARKETING → ATTRACT PROSPECTS → COURSE REGISTRATION → INSTRUCT COURSE → MEET WITH ADVISOR → CONVERT TO CLIENT

GET STARTED

Kathleen Sherman
National Sales Manager
kathleen@emerging-advisor.com
(913) 802-4330

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ADVISOR