50-60 MINUTE COURSE


# VIRTUAL COURSE

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 virtual educational classroom experience. Your Retirement and Taxes will help you comfortably connect with your prospects in an educational setting. By utilizing the program, you can easily teach retirement planning concepts through live or pre-recorded virtual instruction, while solidifying your position as a trusted advisor in the minds of attendees.

**YOUR RETIREMENT & TAXES** is an informative fast-track course focusing on retirement and taxes, law and regulation changes, and situations which can have long-term effects in retirement. Six topic presentation and results-driven introduction and closing modules.

## COURSE PRESENTATION

- Virtual 50-60 Minute Course

## TOPICS COVERED

- Taxation of Income
- Tax-Advantaged Accounts
- Required Minimum Distributions
- Roth Conversions
- Social Security Income
- Withdrawal Strategies

## DEMOGRAPHIC

- Men and Women
- Ages 55 to 75

## EACH COURSE INCLUDES

- Instructor Presentation and Training Guides
- Everything an Advisor Needs to Conduct a Successful Class

## THE PROCESS

DIGITAL MARKETING → ATTRACT PROSPECTS → ONLINE COURSE REGISTRATION → VIRTUALLY INSTRUCT COURSE → LINK TO SCHEDULE → 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