YOUR RETIREMENT AND TAXES

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. 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 at a university in your area, while solidifying your position as a trusted advisor in the minds of attendees.

YOUR RETIREMENT AND 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 OPTIONS

- Single Session: 70-Minute Course
- Weeknight Evenings: 6:30pm Start Time, or Saturday Mornings: 9:30am Start Time
- Recommended Venues: Universities, Colleges, Junior Colleges

TOPICS COVERED

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

THE PROCESS

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

DEMOGRAPHIC

- Men and Women
- Ages 55 to 75

EACH COURSE INCLUDES

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

GET STARTED

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