

# Baby Boomer Retirement Course

## Syllabus

### **COURSE DESCRIPTION:**

This Baby Boomer Retirement Course is a sequence of 3 consecutive sessions designed for those in the early stages of retirement or those about to retire.

This series will look at topics that can be challenging during retirement such as asset risk, retirement income, and estate issues, as well as other topics that can effect retirement. The curriculum for this course is based on recent academic research from various institutions.

We will explore in detail a fundamental shift in retirement planning that is effecting the Baby Boomer Generation. This course is designed as a comprehensive personal finance course for those who are focused on retirement and income optimization options and strategies. It addresses difficult retirement decisions such as:

- Asset Allocation Considerations
- Income Planning
- Social Security Maximization
- Working with Your Core Priorities
- Integrating Money and Life

We will provide you access to financial tools that will help you better understand risk, taxes, budgeting and estate planning. The cost to attend this course includes all course materials. The items you will receive are:

- Baby Boomer Retirement Course Workbook to follow along in class
- Getting Your Financial House in Order Self-Study Guide
- Getting Your Estate in Order Guidebook
- The Personal Wealth Index Questionnaire and Customized Report

### **CLASS REQUIREMENTS:**

You should plan to participate in class discussions, asking questions, debating and commenting on the information and material provided. The class is based on a premise that the United States will continue to be a strong sovereign nation that faces many challenges as the Baby Boomer Generation enters retirement. I will ask you to keep discussions germane to the scope of the class. Short homework assignments will be given to aid in your understanding and comprehension of the course.