

# € TRAINING

Retirement Planning



11 - 15 November 2024  
Boston (USA)



# Retirement Planning

REF: H2058 DATE: 11 - 15 November 2024 Venue: Boston (USA) - Fee: 6325 Euro

## Introduction:

This training program explores essential strategies and techniques for effective retirement planning, helping individuals prepare for a financially secure and fulfilling retirement. It empowers participants to develop comprehensive retirement plans that address their long-term financial goals and needs.

## Program Objectives:

By the end of this program, participants will be able to:

- Understand the fundamentals of retirement planning.
- Develop and implement a personalized retirement savings strategy.
- Evaluate and choose appropriate retirement investment options.
- Plan for healthcare and other retirement-related expenses.
- Create a retirement plan that aligns with personal financial goals and lifestyle aspirations.

## Targeted Audience:

- Financial Planners.
- Retirement Advisors.
- HR Professionals.
- Individuals planning for retirement.
- Investment Consultants.

## Program Outline:

### Unit 1:

#### Fundamentals of Retirement Planning:

- Key concepts in retirement planning.
- Importance of early retirement planning.
- Retirement planning goals and objectives.

- Assessing retirement readiness.
- Understanding different types of retirement plans.

## Unit 2:

### Developing a Retirement Savings Strategy:

- Calculating retirement savings needs.
- Creating a savings plan and setting contributions.
- Tax-advantaged retirement accounts 401k, IRA.
- Strategies for maximizing retirement savings.
- Managing and adjusting savings plans over time.

## Unit 3:

### Retirement Investment Options:

- Overview of investment options for retirement.
- Risk assessment and investment strategies.
- Diversification and asset allocation.
- Evaluating investment performance.
- Selecting appropriate retirement funds and accounts.

## Unit 4:

### Planning for Healthcare and Other Expenses:

- Estimating healthcare costs in retirement.
- Understanding Medicare and other health insurance options.
- Planning for long-term care and insurance.
- Budgeting for non-medical expenses.
- Adjusting plans for unexpected expenses.

## Unit 5:

## Creating a Comprehensive Retirement Plan:

- Integrating savings, investments, and expenses.
- Developing a retirement income strategy.
- Estate planning and wills.
- Monitoring and revising the retirement plan.
- Preparing for retirement transitions and lifestyle changes.