Planning for 21st-Century Retirement

Team-Taught By:
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Dates/Times:
Saturdays, April 29 and May 13 from 9:00 am to 4:00 PM

Course Grading:
Class participants will complete a coordinated set of personal financial planning tools as their final assignment, which will be the basis for grading/credit.

Course Materials
No textbook required. Our class slides, supplementary reading, and customizable tools will be posted online. Username and password will be provided to the class.

Course Outline

Day 1 – April 29
What is 21st Century Retirement?
• Challenges for 21st Century Retirees
• Envisioning & Funding Your Retirement

Our Values-Based Retirement Planning Framework
• Our Retirement Planning Roadmap
• Budgeting
• Personal Financial Overview
• What’s My Number?

Investing for Retirement
• Investments 101
• Asset Allocation
• Accumulating & Managing Your Retirement $s

Day 2 – May 13
Predictable Sources of Retirement Income
• Social Security
• Pensions & Annuities

Variable Sources of Retirement Income
• Converting Retirement Assets into Lifetime Income
• How Can You Avoid Running Out of Money?
• Harvesting Sequence & Tax Considerations in Distributing Retirement $s

Special Issues in Retirement & Implementing Your Retirement Plan
• Healthcare, Medicare & Long Term Care
• Estate Planning
• Putting It All Together