Spring 2019
WSP 164: Planning for 21st-Century Retirement

Team-Taught By:
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Dates/Times:
Saturdays, May 4th and May 18th from 9:00AM to 4:00PM

Course Grading:
• No Grade Requested (NGR)
  o This is the default option. No work will be required; no credit shall be received; no proof of attendance can be provided.
• Credit/No Credit
  o Class participants will complete a coordinated set of personal financial planning tools as their final assignment, which will be the basis for receiving credit.

*Please Note: If you require proof that you completed a Continuing Studies course for any reason (for example, employer reimbursement), you must choose the Credit/No Credit option. Courses taken for NGR will not appear on official transcripts or grade reports.

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

Course Outline

Day 1 – May 4th

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 18th

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