Financial Strategies for Successful Retirement®

Retirement Planning Course

The class will address the following topics:

- Retirement Planning
- Tax Planning
- Estate Planning
- Investments
- Risk Management

Location
Training Center
1432 Edinger Avenue
Suite 200
Tustin, CA 92780

Dates & Times
Saturdays
Sep 19 & 26
8:30am - 1pm

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Why Adult Financial Education Matters

Financial Strategies for Successful Retirement® is a course designed to help and educate attendees about important concepts regarding retirement planning. Students that attend the class will learn about the many factors that affect their financial plan and how to incorporate them into a robust retirement plan. The class will help address questions such as:

1. Do you have enough money to retire?
2. Are you prepared for the next market correction?
3. Do you know all the ways to maximize your Social Security benefits?
4. Will you have enough money to cover your retirement care?
5. Do you know how probate and estate taxes work?

Who Should Enroll?

This class is designed for people ages 55 to 70+. Anyone who is thinking about retiring, is retired or is beginning to make a retirement plan is encouraged to attend. If you are curious about your retirement income, risk management and Social Security, then this course is for you.

Retirement planning can, at times, appear to be a daunting task. Let us lead you through the world of retirement planning and clear up any confusion or worries you may have. Discover ways to protect yourself and prosper regardless of the economy. Remember, it is never too early or too late to start planning for your retirement.

About Your Course Instructor

Brian Douglass, CFP®, AIF®, EA

Brian graduated from the University of California, Irvine with a Bachelor’s Degree in Economics. He also attended California State University, Fullerton and received a Bachelor’s Degree in Business Administration with a concentration in Accounting. Currently, Brian oversees compliance at FAN and works with families to manage their taxes and retirement planning.

Tuition & Fees

To attend the class, advanced registration is required. The course tuition is $59. This fee covers all materials used for the class. You may bring a guest for an additional $5. We strongly encourage couples to attend together, as teamwork is key in retirement. If you choose to pay via check, please make it payable to: Financial Advisors Network, Inc. To register, call (714) 597-6510 or visit fssrclass.com.

Course Structure

The Financial Strategies for Successful Retirement® course is taught by four friendly and experienced instructors who are dedicated to helping you maximize your retirement potential. Classes are set in a relaxed learning environment that enables the instructor to provide useful tips and facts to all who attend. While our educator leads the class, group participation is encouraged to make the time as fun and helpful as possible.
Your Retirement Income

- Sources of retirement income
- The value of tax-deferred and tax-free investment vehicles
- Taking money out of your employer retirement plans
- Required minimum distribution and withdrawal rules
- Choosing your retirement plan beneficiary
- Retirement checklist
- Hidden costs associated with investments
- Understanding market assumptions related to your portfolio
- Distribution strategies in retirement
- Using real estate to generate income

Financial Basics

- Retirement Income: Perception vs. Reality
- Making your money last
- Nine reasons people fail financially in retirement
- Using credit wisely
- Making compounding work for you
- Available tax strategies
- The difference between fiduciaries and brokers, and why it matters
- The relationship between your investments and taxes
- Uses for backdoor Roth conversions

Risk Management

- Ways to potentially help manage risk
- Health insurance and Medicare
- Disability income insurance
- Determining life insurance needs
- Top 10 estate planning mistakes
- Evaluating long-term care insurance

Social Security

- What the advantages of waiting to draw Social Security are
- How your benefits affect your taxes
- Determining the pros and cons of applying for Social Security at different ages
- What strategies you could use to maximize your benefits
- How you can provide the biggest benefit to your spouse

There is no assurance provided that the financial concepts and strategies discussed will provide investment success. Investments are subject to market fluctuation, risk and potential loss of principal. Actual results depend on many factors as discussed in the classes. Past performance is no guarantee of future success. Financial Advisors Network, Inc. advisors do not offer tax advice, legal advice or services.
We will help answer these questions:

- Do you have enough money to retire?
- Are you paying as little in taxes as you have to?
- How long will your money last?
- How can you correlate your investments with your taxes?
- Do you have a good retirement plan?
- What is the best distribution strategy for your retirement?
- What conservative assumptions should you use?
- What are the various ways of owning real estate?
- How can you use real estate income in retirement?
- What is a backdoor Roth?
- What is the difference between a fiduciary and a broker?
- When is the best time to make a Roth conversion?
- How can you use real estate as a source of income in retirement?