CONSERVATIVE RETIREMENT PLANNING

A CLASSROOM COURSE THAT TEACHES SIMPLE STEPS YOU CAN TAKE TODAY THAT WILL HELP YOU PLAN FOR THE RETIREMENT YOU WANT TOMORROW

Financial Planning
ADULT EDUCATION CONFERENCE CENTER

Financial Planning
Adult Education Conference Center
77 Gilcreast Road
Suite 2003
Londonderry, NH 03053

Learn about these important topics:

- The rules of retirement
- Common retirement planning mistakes
- Historical perspective on risk
- Income Planning
- Tax and distribution planning
- Social Security Maximization
- Creating your own plan

REGISTER TODAY

www.AdultFinancialEducation.org
603-552-3230

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Key Concepts Covered:

- The trade-off between risk, return, and liquidity
- Determining your personal risk tolerance and your own unique "Color of Money"
- 5 Wall Street "Myths" and 5 Common Retirement "Mistakes"
- Making "tax wise" distributions from your IRA, 401(k), 403(b) and other retirement plans
- Creating the income stream you desire for retirement
- 7 steps to creating your own ABC Retirement Plan
- Maximizing Social Security benefits for yourself and your spouse
- Developing a retirement budget you can live with
- **And much more!**

Course Schedule

Financial Planning
Adult Education
Conference Center
77 Gilcreast Road, Suite 2003
Londonderry, NH 03053

Weeknight Class Series

Part 1 - Tuesday, May 23
6:15 pm - 8:45 pm

Part 2 - Thursday, May 25
6:15 pm - 8:45 pm

"The question isn't at what age I want to retire, it's at what income."

- George Foreman

"Retirement is like a long vacation in Las Vegas. The goal is to enjoy it to the fullest, but not so fully that you run out of money."

- Jonathan Clements

Course Description

This comprehensive course was developed to address the biggest concerns and challenges most Americans face when planning for retirement. In an interactive classroom setting, your instructor will cover the essentials of a sound retirement plan and break down key concepts in easy-to-understand terms. You will leave with a much better understanding of retirement planning and have the tools, insights, and strategies that you need to make informed decisions and confidently build a retirement plan that will meet your specific needs and goals.

How This Course Is Taught

Course instructors are financial services professionals who bring many years of experience to the classroom and enhance the text book materials with "real world" examples.

The best way to profit from this interactive course is to read the assigned textbooks, do the assigned homework, ask questions and participate in the classroom discussions as you feel comfortable. This is not a financial seminar; this is a financial course of study where you will receive unbiased and objective guidance and the knowledge and confidence to make financial decisions suited to your level of risk and in line with the goals and objectives you establish.

WHO SHOULD ATTEND

This course is designed specifically for individuals or couples 50 or older who are retired or planning for retirement.

Whether you are concerned about stock market risk, rising taxes and inflation, or if you just want to better understand your IRA/401(K) or make the best decision on your Social Security benefits; this in-depth course will be time well-spent.

WHAT YOU WILL LEARN

This is an educational course that teaches the Principles of Conservative Retirement Planning.

CONSERVATIVE RETIREMENT PLANNING

Course Instructor

Michael A. Licciardi is a licensed financial professional who brings many years of conservative retirement planning experience to the classroom. He enhances the course material with his own experiences and actual real life examples of the principles being taught. If you have questions that are personal in nature or relate to specific financial products, you may arrange to meet privately with your instructor for a strategy session after the course is complete. The consultation is complimentary for class attendees but is not required.

TOOLS FOR PLANNING

A workbook specifically designed to follow and support the classroom instruction

Asset Review Forms

Retirement Budget Form

Risk Tolerance Questionnaire

CLASSES STARTING SOON - REGISTER TODAY!

Financial Planning Adult Education Conference Center
77 Gilcreast Road, Suite 2003
Londonderry, NH 03053

Tuition is $39.95.
Spouse may attend at no cost.

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AND

Part 2 - Thursday, May 25
6:15 pm - 8:45 pm

Register Online
www.AdultFinancialEducation.org

Register By Mail
Complete the Registration Form below and mail with your tuition check to:

AECC
P. O. Box 898
Londonderry, NH 03053

For Questions, please call 603-552-3230

REGISTRATION FORM

CONSERVATIVE RETIREMENT PLANNING

Name: ____________________ Address: ____________________

City: ____________________ State: __________ Zip: __________

Phone: ____________________ E-mail: ____________________
FOR REGISTRATION CONFIRMATION PURPOSES ONLY

Course:
Tuesday, May 23 and Thursday, May 25
6:15 pm - 8:45 pm

Tuition is $39.95 per person

☐ I am bringing my spouse at no extra cost

Spouse/Guest Name: ____________________

Please mail Registration Form with your tuition check to:

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Make checks payable to: AECC