Retirement 101

3-5 CE credits

This inspiring and powerful presentation was designed to assist Doctors and their spouses prepare for retirement. Participants will **learn their Retirement "Number"** *(no Quicken or receipts needed)*, devise a **budget**, and find their **yearly savings necessary**. Next, utilizing online software, participants will further refine their "number" and find how changing variables, such as retirement age or savings per year, affect future wealth. We will also discuss how participants can **amplify their personal savings from $25,000 to $50,000 this year** *without changing practice methods or personal lifestyle.*

The **Five-Hour Course** continues with investment strategies, the secrets to wealth building, pre-retirement and retirement goal setting, and illuminates the options for transition planning.

Attendees will:

- Devise a retirement budget, then use tables and software to calculate a retirement savings goal.
- Learn to use the software in the future to evaluate progress toward financial goals.
- Learn of specific immediate steps to increase personal yearly savings dramatically.

For the **Five-Hour Course**, additionally:

- Have an appreciation for asset allocation and risk determination and be able to choose an ethical investment adviser.
- Understand different retirement strategies and the time and financial commitment needed for each.
- Evaluate goals for life after dentistry.
- Learn of the options for transition planning.

For 5 to 45 doctors. *Spouses are encouraged to attend.*
The **"neutral" financial environment** has been very popular with couples.

*"The course was fun and **an eye-opener**. The work sheets were **comprehensive** and very **informative**. This course is **a must for anyone** at any age."*
- Dr. and Mrs. Craig Steichen

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