Jason Vander Pol Approved for use 5/23/2019

# Retirement Planning University

**An Educational Retirement Planning Course for Adults**

University of Louisville, Shelbyville Campus

Founders Union, Room 136B

450 N Whittington Parkway, Louisville, KY 40222

## Learn how to:

• Avoid the 10 most common retirement planning mistakes
• Plan your retirement income to fit your lifestyle
• Understand how the new changes to Social Security benefits may impact your retirement
• Take control of your 401(k) and retirement accounts
• Evaluate strategies to help protect against the high cost of healthcare
• Calculate how much risk you're taking with your hard earned dollars
• Learn how to stress test your portfolio
• Plan your estate properly through the use of wills, trusts, and tax reduction strategies

# Education for Adults

### Building Your Game Plan for Retirement

Today's retirement landscape is vastly different than in preceeding decades. Retirement today is all about capital preservation with growth for income NOW or income in the future. Risks are abundant: Sequencing risk, longevity risk, health care risk, inflation risk, and market risk. This course will educate you on the investments you currently have, other types of investments available, and how to position yourself to realize your personal financial goals.

## Who Should Attend?

Anyone interested in learning more about the many decisions to make when planning for or enhancing your retirement future. In our class, we will focus on retirement planning and your specific questions and concerns.

## This class is for:

- Individuals and/or couples who are retired or will be retiring in the next 5 years
- Current and future retirees concerned about the future of U.S. tax rates and trends

# Here's What You'll Receive

### Objective Education and Instruction

This course is designed to examine the "Big Picture" as it relates to your retirement planning. Specific topics such as 401(k)s, IRAs, brokerage accounts, taxes, health care, estate planning, etc., become more meaningful when they are incorporated into one cohesive plan where these various components work together. This course aims to pave the path for your complete retirement game plan. This course is strictly educational. Specific financial products will NOT be discussed. Your class will be taught by a qualified financial professional who will enhance the learning experience with real-life examples. The lecture format is interactive and encourages students to participate and ask questions, though not required.

### Course Textbook, Workbook and Class Materials

The course textbook includes examples and illustrations to help educate you on retirement. Your workbook is written in easy-to-understand terms to help you learn more about the financial concepts discussed in class. **THESE ARE YOURS TO KEEP**. The book and class materials are designed to follow along with the presentations. Together, these materials provide a step-by-step process to apply your knowledge and will become a useful reference tool after the course is complete.

### Opportunity for Customized Retirement Planning

Included in your tuition is the opportunity to meet one-on-one with the course instructor to address your personal questions and apply the course material to your specific situation. This is the equivalent of "Office Hours" in a university setting and is not mandatory, but has been described by many as the highlight of the course.

# Course Outline

## Investment Planning
- Three investing worlds
- Most common types of fees
- How to measure your risk tolerance
- Understanding risk vs reward

## Estate Planning
- Types of trusts
- Probate process
- Legacy planning
- Beneficiary designations

## Tax Planning
- History of taxes
- What taxes pay for
- Three tax buckets
- How to create tax free income

## Social Security Planning
- How to take and When
- Costly mistakes retirees make
- Claiming strategies
- Social Security benefits

## Healthcare Planning
- Long term care
- Medicare and health insurance options
- Evaluating the cost of coverage
- Options for early retirees

## Income Planning
- Inflation
- longevity of income
- Sequence of returns
- Building a financial house

# Register

## Location:

University of Louisville, Shelbyville Campus
Founders Union, Room 136B
450 N Whittington Pkwy, Louisville, KY 40222

## Dates & Times:

Monday, June 17th & Wednesday June 19th
from 6:00PM to 9:00PM

## Your Instructor

Dustin Stanley, Investment Advisor Representative & Partner of Strategic Wealth Designers, LLC.

Registration Form:

Monday, June 17th & Wednesday, June 19th
from 6:00 PM to 9:00 PM

Your Name: ____________________

Your Address: ____________________

City, State, Zip: ____________________

Daytime Phone: ____________ Cell Phone: ________

Email address: ____________________

Tuition: ☐ $39 Early Registarion ☐ $59 Day Of

☐ I am bringing my spouse or guest at no additional charge. Tuition includes one workbook.

Name of spouse: ____________________

## EASY WAYS TO REGISTER:

### CALL US TODAY

AT 502-412-3354

### TO REGISTER WITH VISA OR MASTERCARD.

REGISTER ONLINE AT
THERETIREMENTZONE.COM/UOFL

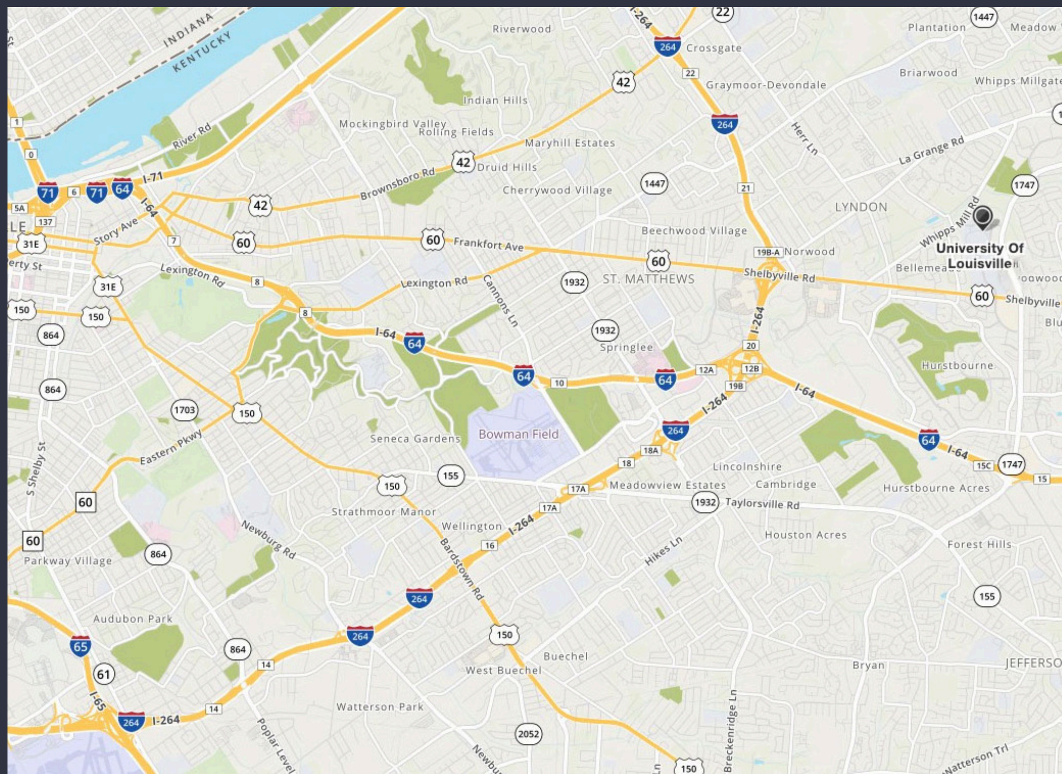
### TO REGISTER WITH CHECK:

CALL 502-412-3354

### QUESTIONS? CALL

502-412-3354

# DIRECTIONS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Rolling Fields
Maryhill Estates
River Rd
Brownsboro Rd
Druid Hills
Cherrywood Village
Herr Ln
La Grange Rd
LYNDON
Whipps Mill Rd
University Of Louisville
Beechwood Village
Norwood
Bellemeade
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Frankfort Ave
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Shelbyville Rd
Lexington Rd
Cannons Ln
Springlee
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Eastern Pkwy
Seneca Gardens
Bowman Field
Lincolnshire
Meadowview Estates
Cambridge
Hurstbourne Acres
Taylorsville Rd
Strathmoor Manor
Wellington
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Bardstown Rd
Houston Acres
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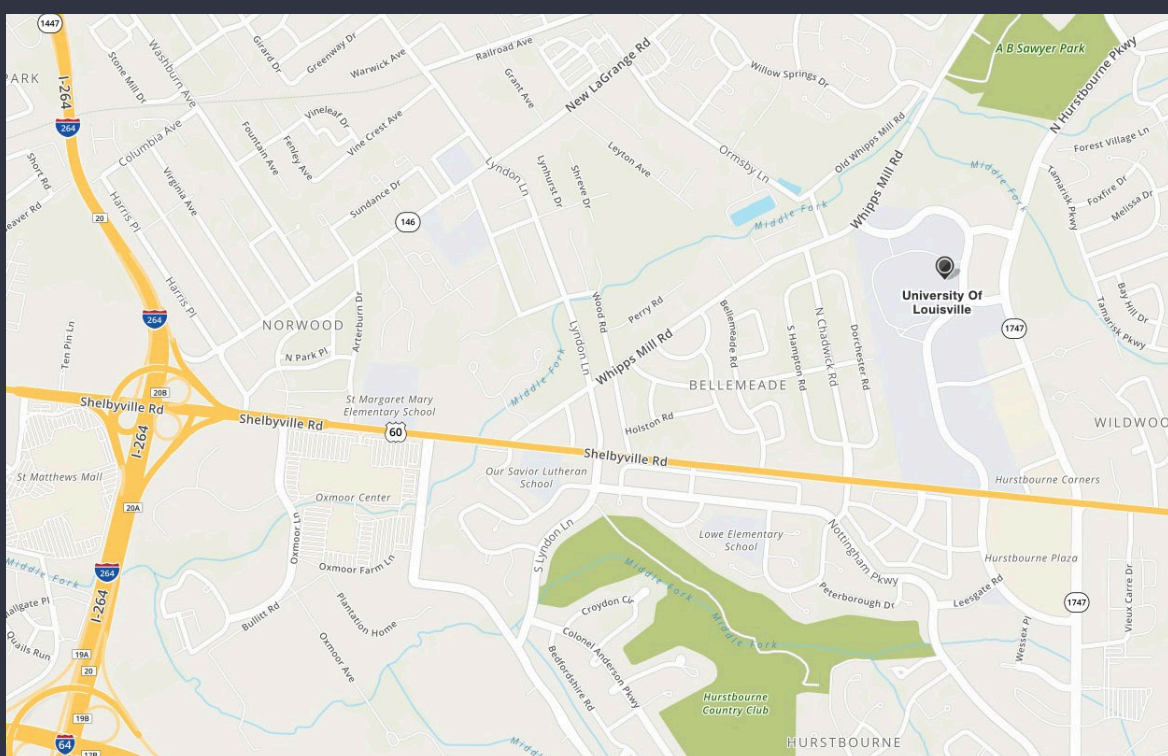
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Columbia Ave
Vinelear Dr
Vine Crest Ave
Leyton Ave
Ormsby Ln
Old Whipps Mill Rd
Whipps Mill Rd
Forest Village Ln
Short Rd
Virginia Ave
Fountain Ave
Fenley Ave
Lyndon Ln
Lynhurst Dr
Shreve Dr
Middle Fork
Sundance Dr
Harris Pl
University Of Louisville
NORWOOD
N Park Pl
Arterburn Dr
Wood Rd
Perry Rd
Bellemeade Rd
S Hampton Rd
N Chadwick Rd
Dorchester Rd
Ten Pin Ln
BELLEMEADE
Shelbyville Rd
St Margaret Mary Elementary School
Holston Rd
WILDWOOD
St Matthews Mall
Our Savior Lutheran School
Hurstbourne Corners
Oxmoor Center
Oxmoor Ln
Oxmoor Farm Ln
S Lyndon Ln
Lowe Elementary School
Nottingham Pkwy
Hurstbourne Plaza
Peterborough Dr
Leesgate Rd
Croydon Cr
Colonel Anderson Pkwy
Bedfordshire Rd
Bullitt Rd
Plantation Home
Oxmoor Ave
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