Retirement Planning University

An Educational Retirement Planning Course for Adults

4600 S Syracuse St, Suite 100

Denver, CO 80237

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.

- Pre-retirees interested in learning more about the many decisions to make when planning for or enhancing your retirement future
- 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 US tax rates and trends
- Anyone with specific questions or concerns about retirement planning

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. The goal of this course is to pave the path for your complete retirement game plan. This course is strictly educational and 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 although not required, students are encouraged to participate and ask questions.

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 a Retirement Planning University instructor for an individualized financial consultation to answer your retirement questions and apply the course material to your personal financial 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

Join Us In Person or Online:

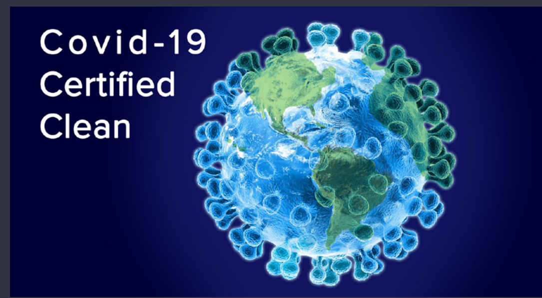
4600 S Syracuse St, Suite 100
Denver, CO 80237
Online at RetirementPlanningUniversity.com/DU

Dates & Times:

Tuesday, July 28th & Thursday July 30th from 6:00PM to 9:00PM

Your Instructor

Jordan Schwartz, Investment Advisor Representative & Partner of Strategic Wealth Designers, LLC.



In order to protect everyone's health, this class has the following safety protocols:

- All those entering will be given a complimentary mask to wear
- All surfaces have been wiped down and thoroughly cleaned
- Access to hand sanitizer
- Class size has been limited to 12 persons to ensure social distancing during class
- **This class will be available online for any persons who sign up, but do not feel comfortable leaving their homes**

Registration Form:

Tuesday, July 28th & Thursday, July 30th
from 6:00 PM to 9:00 PM

Your Name: ______________________________

Your Address: ______________________________

City, State, Zip: ______________________________

Daytime Phone: ______________ Cell Phone: ________

Email address: ______________________________

Tuition: ☐ $39 Early Registation ☐ $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 303-952-4044

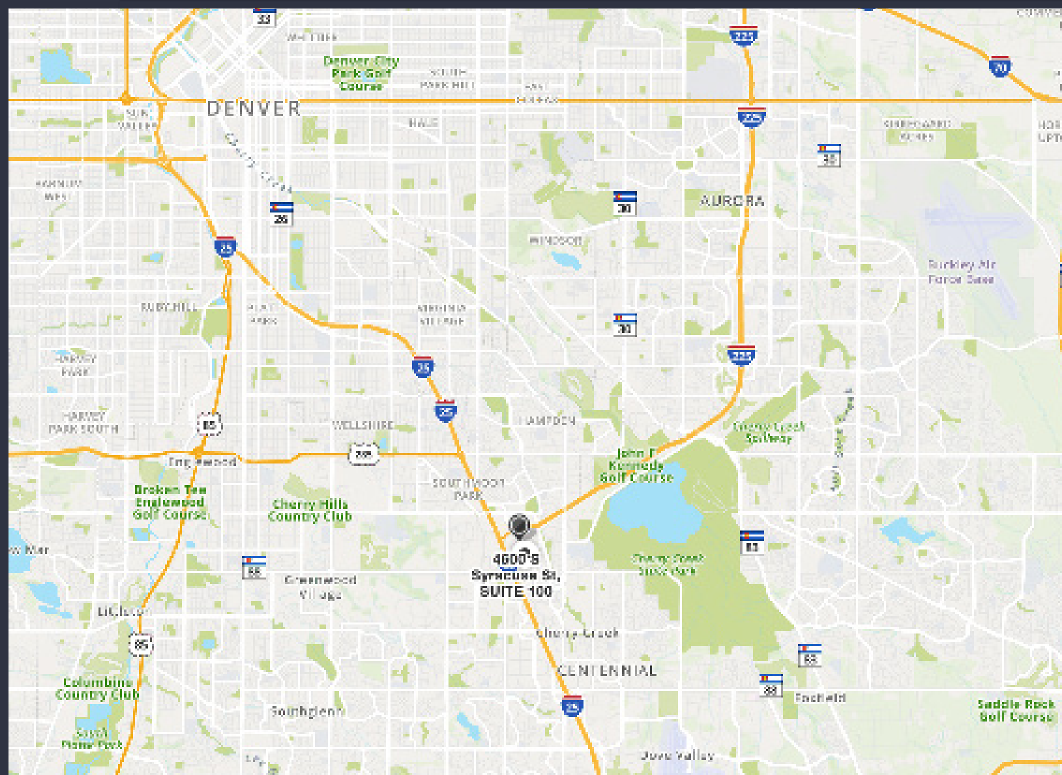
TO REGISTER WITH CARD.
REGISTER ONLINE AT
RetirementPlanningUniversity.com/DU

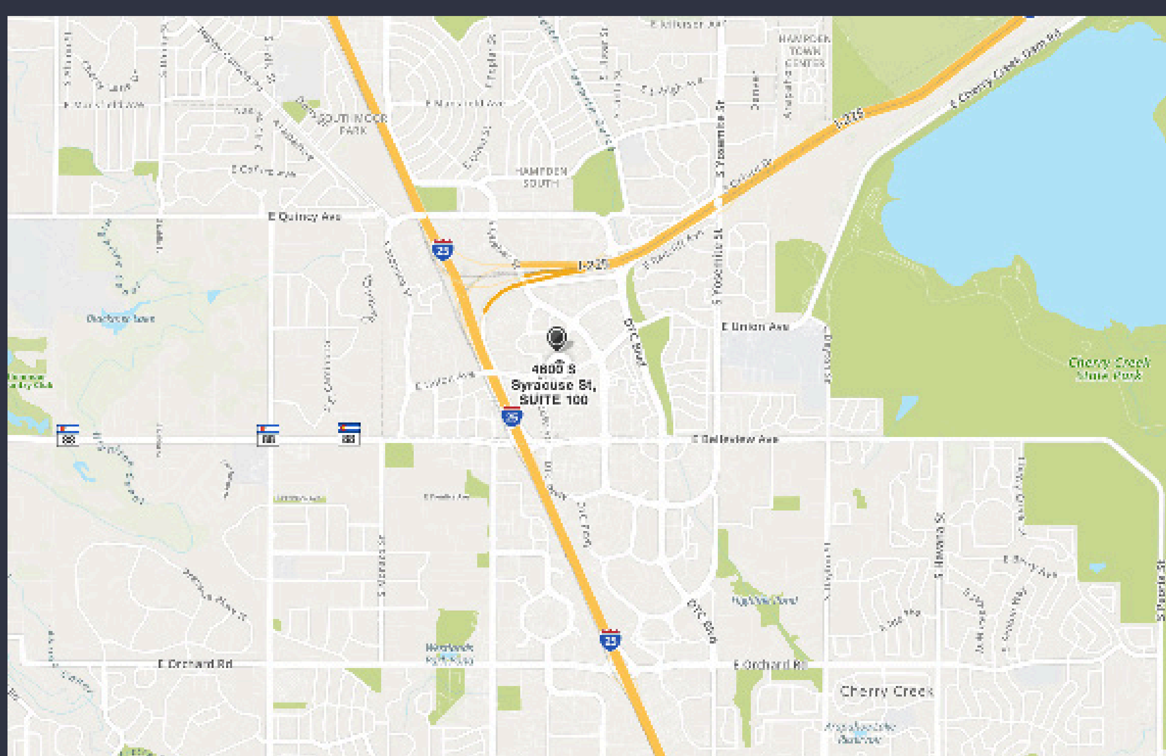
TO REGISTER WITH CHECK:
CALL 303-952-4044

QUESTIONS? CALL
303-952-4044

WHEN REGISTERING, BE SURE TO LET US KNOW IF YOU PLAN TO ATTEND IN PERSON OR JOIN ONLINE

DIRECTIONS


DENVER
AURORA
Denver City Park Golf Course
Buckley Air Force Base
WELLSHIRE
HAMPDEN
Englewood
Broken Tee Englewood Golf Course
Cherry Hills Country Club
John F Kennedy Golf Course
4600 S Syracuse St, SUITE 100
Greenwood Village
Cherry Creek
CENTENNIAL
Columbine Country Club
Southglenn
Foxfield
Saddle Rock Golf Course
Dove Valley


E Quincy Ave
HAMPDEN SOUTH
4800 S Syracuse St, SUITE 100
E Union Ave
E Belleview Ave
E Orchard Rd
Cherry Creek
Cherry Creek State Park
S Havana St