

# RETIREMENT ENGINEERING WORKSHOP SYLLABUS

## MODULE 1 | Time for a New Model

- What is Retirement Engineering?
- Why Traditional Approaches May Fail Many Retirees
- Transitioning From the Accumulation to the Distribution Stage of Your Life
- How to Create a Retirement Blueprint That Covers All Aspects of Retirement

## MODULE 2 | Retirement Planning

- Why It's Not Simply About Your Investments
- What are RMDs and Strategies to Replace Them?
- Importance of Liquidating Accounts in the Correct Order
- How the Sequence of Investment Returns May Dramatically Impact Your Retirement
- Learn the Power of Maximizing Social Security/Pension Income Streams

## MODULE 3 | Tax Strategies

- Setting Up Your Current 401(k) Properly
- How 401(k)s and IRAs Could Negatively Affect Your Retirement Income
- Examining the 3 Basic Types of Tax Accounts and Maximizing the Benefits of Each
- Effects of Losing Tax Deductions in Retirement
- How Our Nation's Spending and Debt Could Directly Impact Your Retirement Income
- Determining if Roth Contributions or Conversions are Right for Your Situation

## MODULE 4 | Maximizing Social Security

- When and How You Should Take Your Benefit to Maximize Long-Term Income
- How Maximizing Your Benefits Has a Positive Effect on a Surviving Spouse
- Updated Strategies in Relation to Your Situation

## MODULE 5 | Estate Planning

- Estate Planning is for Everyone
- Estate Planning Allows You to Control Your Assets and Health Care Decisions in the Event of Incapacity, Not Just Death
- The Many Benefits of Having a Trust
  - Avoid Probate; Maintain Privacy; Ease of Administration; Tax Savings; Quicker and More Cost Effective Than Probate; Can Discourage Litigation When Done Properly
- Having a Plan for Incapacity and Other Health-Related Issues That May Arise in the Future
- Proper Estate Planning is an Investment in Your Family's Future

## MODULE 6 | Protecting Against Market Loss

- Why "Win by Not Losing" Should be Your Investment Philosophy in Retirement
- Examining Traditional Approaches to Risk Management and Analyzing Why They Don't Work in Today's Investment Environment
- Why Protecting Your Principal is as Important as Getting Great Returns in Retirement
- Protecting Yourself From Market Volatility While Still Being Invested in the Market
- Designing Efficient Income Streams in Your Portfolio

For more information or to sign up, visit [www.myretirementclass.com!](http://www.myretirementclass.com!)