



Financial Education - "Sophomore" series

Please Note: This Education is designed for those nearing retirement.

Changes in the investment markets, healthcare system, government programs, and employer retirement plans are impacting us all. As a result, you, may be asking yourself more questions than you can

The Retire U "Sophomore" workshop series offers you a comprehensive financial education program that complements your existing benefit offerings while providing you with the information you need to achieve your retirement goals. And it's provided at no cost.

Topics discussed:

- What you need to know to prepare for Retirement
- Tax Strategies
- Legal Planning necessary
- The stages of retirement of how your spending will change as you age
- Healthcare decisions post retirement including: Medicare, Supplement and Advantage Plans,
- Long Term Care / Elder Care Planning
- Alternative Investments
- Investing in 2017
- Retirement Income planning
- Social Security: A Comprehensive Review with Collection Strategies
- Risks of retirement
- Bond Ladders
- Income Allocation

"SOPHOMORE" WORKSHOP - 2 SERIES! TUESDAYS OR WEDNESDAYS

Dates:	Tuesday, March 28 th AMU227 or Wednesday, March 29 th AMU163 – Workshop 1 of 4 Tuesday, April 4 th AMU163 or Wednesday, April 5 th AMU163 – Workshop 2 of 4 Tuesday, April 11 th AMU163 or Wednesday, April 12 th AMU163 – Workshop 3 of 4 Tuesday, April 18 th AMU163 or Wednesday, April 19 th AMU163 – Workshop 4 of 4
Time:	11:30 a.m. – 1:00 p.m. each day
Location:	Alumni Memorial Union – Please note the location.
Registration	Register online at www.retireu.com : select your Series of choice Tuesdays or Wednesdays, alternatively email your request to nextlevel@nlpwm.com or call 414-369-6620