

Class Overview

ALL CLASSES WE TEACH

Our educational classes provide employees with clear, practical guidance on the most important retirement decisions—so they can plan with confidence and reduce the burden on HR.



Navigating Social Security

Make informed Social Security decisions that can maximize your lifetime benefits.

Topics include:

- Optimal timing to claim
- How age affects benefits
- Spousal benefits
- Taxation of benefits
- Planning for retirement



Understanding Medicare

Learn how Medicare works and how to make the right choices for your healthcare in retirement.

Topics include:

- Medicare Parts A, B, C & D
- Enrollment timing
- Medicare Advantage vs. Supplement Plans
- Prescription drug coverage
- Avoiding late penalties



Understanding Taxes in Retirement

Discover tax strategies that help you keep more of your retirement income.

Topics include:

- Provisional income
- RMDs and tax brackets
- Roth conversions
- Capital gains & losses
- QCDs and tax reduction



Estate Planning 101

Protect your legacy and ensure your wishes are carried out.

Topics include:

- Wills vs. trusts
- Key elements of an estate strategy
- Protecting assets
- Implementing wishes
- When to take action



Social Security & Medicare

Understand how Social Security and Medicare work together to strengthen your retirement plan.

Topics include:

- Best time to claim
- Tax strategies for Social Security
- Medicare basics
- Plan comparisons
- Coordination strategies



Tax Planning

Plan ahead to minimize your tax liability and keep more of what you earn.

Topics include:

- Income tax strategies
- RMD and tax planning
- Roth vs. traditional IRAs
- Capital gains management
- Charitable giving options



Digital Estate Planning

Organize your digital assets and ensure your online legacy is protected.

Topics include:

- Digital asset inventory
- Online account access
- Digital wills & passwords
- Protecting your identity
- Planning for your heirs



SMART Retirement Planning

Build a personalized retirement plan designed to help you live the life you envision.

Topics include:

- Retirement income planning
- Risk management
- Investment strategies
- Social Security timing
- Ongoing plan updates



WHY OFFER THESE CLASSES?

Employees gain trusted, unbiased education to make confident financial decisions—reducing stress, improving retirement readiness, and saving HR time.



Scan the QR code to learn more or contact us here:

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