

Smart Strategies for your 403(b) Retirement Plan – presented at 10:00 a.m.
by Keith Dorney, Financial Knowledge, a financial education organization.

Description

Participants who attend this course will gain an understanding of which 403(b) plan investments and strategies are most appropriate for them to achieve their financial goals. In addition, participants will develop confidence in their ability to develop and modify their own 403(b) plan investment portfolios.

Audience

Recommended for those who desire a greater ability to make informed investment decisions with their 403(b) plan

Materials

Each participant will receive a 55-plus page workbook, which reviews each topic covered and provides resources and a glossary for future use

Duration

2 hours

Objectives

- Discover important retirement plan features concerning enrollment, contributions, plan rule changes, matching, and vesting.
- Review retirement plan investment choices.
- Uncover the reasons for blackout, quiet, or lockdown periods.
- Find out four reasons why retirement plan loans are discouraged.
- Evaluate the ramifications of plan rollovers, transfers, and distributions.
- Define mutual fund terminology and fund types.
- Complete a personalized risk tolerance survey.
- Identify six risks that are typically present in most retirement plans.
- Assess the power of compounding and the impact of inflation.
- Utilize five essential tools to help manage risk.
- Learn important asset allocation techniques for retirement plan investing.
- Analyze and modify retirement plan portfolios.
- Avoid eighteen common retirement plan investing mistakes.