

## RETIREMENT MANAGEMENT FORUM

# Helping Advisors Prepare Clients for Success in Retirement

By Greta Gloven

**L**earn how to better support clients entering or living in retirement at the Investments & Wealth Institute® Retirement Management Forum, December 3–4, 2018, at the Ritz Carlton Amelia Island in Florida.

Clients of all ages are looking for expertise in retirement planning, especially when it comes to holistic, multidisciplinary planning for an entire household. In an environment where thousands of Americans are entering retirement each day, advisors play an integral role in helping their clients prepare for successful, rewarding retirement. In this two-day seminar, advisors will learn how to look at retirement planning in a more comprehensive way through sessions and workshops by the nation's top retirement experts focusing on an

array of important issues, including the following:

- “Retirement of Age: Why Your Income Strategy Should be Based on Biology and not Chronology,” Moshe Milevsky, PhD, professor, Schulich School of Business at York University
- “Falling Short: The Coming Retirement Crisis and What to Do About It,” Alicia Munnell, PhD, professor, Center for Retirement Research, Boston College
- “Social Security: Addressing Critical Issues with Clients,” Steve Siegel, JD, LL.M., The Siegel Group
- “Generating Tax Alpha with Effective Asset Location,” Michael Kitces, MSFS, MTAX, CFP®, CLU, CHFC, FHU, REBC, CASL
- “The Impact of Longevity and Our Society and Economy,”

Sharon Carson, RMA<sup>SM</sup>, CRPC, executive director, J.P. Morgan Asset Management

- “Market Update,” Jonathan Golub, CFA®, managing director and chief U.S. equity strategist, Credit Suisse

Advisors can earn up to 15 hours of live and online continuing education (CE) credit for Certified Investment Management Analyst®, Certified Private Wealth Advisor®, and Retirement Management Advisor<sup>SM</sup> certifications. This program will be submitted to the CFP Board for review. The Institute is a CFP Board CE Quality Partner.

Register for the conference at [www.investmentsandwealth.org/RMF](http://www.investmentsandwealth.org/RMF). ●

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