

RETIREMENT MANAGEMENT

Interested in retirement management and unsure where to start?

The Investments & Wealth Institute has a variety of options suited to your learning style, CE needs and more. Below, find short, 1-hour recordings; live, 4-hour virtual events; and in-depth courses for up to 25 CE hours. Ultimately, take your education and credentials to the next level with a Retirement Management Advisor (RMA) certification.

Topic	CE Hours	Type	Cost
Defining a Meaningful Inheritance through a Four-Step Process On-Demand	1	On-demand	Member: \$50 Nonmember: \$75
Retirement and Its Discontents: Why We Won't Stop Working, Even If We Can On-Demand	1	On-demand	Member: \$50 Non-Member: \$75
Retirement Demographics & Opportunities On-Demand	3	On-demand	Members: \$195 Join & Learn: \$50
Focus on Retirement Income Strategies	4	Virtual Event: August 26, 2020 11 a.m.–3:30 p.m. EST	Member: \$195 Join & Learn: \$445
Retirement Management Forum On-Demand	4.5	On-demand	Member: \$249 Join & Learn: \$449
Retirement Management Advisor Course (Level 1)	25*	Course	Member: \$1,395 Join & Learn: \$1,595
Retirement Management Advisor Course - Path to Certification	25*	Course	Member: \$2,495 Join & Learn: \$2,695
RMA Certification	40*	Certification	Member: \$2,495 Join & Learn: \$2,695
Estate Planning and Trusts	N/A	Podcast	Free
Estate Planning and Charitable Giving With Martin Shenkman	N/A	Podcast	Free
Current State of Retirement in the United States	N/A	Podcast	Free
Will the Financial Fragility of Retirees Increase?	N/A	Podcast	Free
Insight on Retires over 85	N/A	Podcast	Free

On-demand recording: 1 CE hour,
quick and convenient

* includes CFP CE

** Join and learn includes 1-year membership

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Change Your Focus: Advising for Retirement	N/A	Podcast	Free
Topic	CE Hours	Type	Cost
The Retirement Planning Jigsaw Puzzle	N/A	Podcast	Free
Reverse Mortgages and What Advisors Should Understand	N/A	Podcast	Free
Key Life Stages for Clients in Retirement	N/A	Podcast	Free
The Role of Annuity Products in Retirement Planning	N/A	Podcast	Free
How Today's Retirees Are Financially Fairing w/ Catherine Collinson	N/A	Podcast	Free
Retirement Risks w/Anna Rappaport	N/A	Podcast	Free
Retirement Income Strategies w/David John	N/A	Podcast	Free

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