YOUR RETIREMENT AND TAXES

RETIREMENT
ELEVATED

WHY RETIREMENT ELEVATED?

Emerging Advisor offers complete retirement education courses designed BY advisors FOR advisors, with everything you need to conduct an exceptional educational classroom experience. Your Retirement and Taxes will help you comfortably connect with your prospects in an educational setting. By utilizing the program, you can easily teach retirement planning concepts at a university in your area, while solidifying your position as a trusted advisor in the minds of attendees.

YOUR RETIREMENT AND TAXES is an informative fast-track course focusing on retirement and taxes, regulation and law changes, and situations which can have long-term effects on retirement.

DEMOGRAPHIC REACHED

- Men and Women
- Ages 55-75
- $250,000+ Retirement Assets

TOPICS COVERED

- Taxation of Retirement Income
- Tax Advantaged Accounts
- Required Minimum Distributions
- Roth Conversions
- Social Security Income
- Tax Efficient Withdrawl Strategies

EACH COURSE INCLUDES:

- Quality Student Workbooks and Supplemental Handouts
- Comprehensive Instructor Presentations
- Instructor Materials and Video Training Guides
- Fully Managed Digital Marketing Campaign
- Process Tutorial & Review with your Team
- Automated Follow-Up Services

OUR PROCESS

MARKETING CAMPAIGN → ATTRACT PROSPECTS → COURSE REGISTRATION → INSTRUCT COURSE → MEET WITH ADVISOR → CONVERT TO CLIENT

GET STARTED

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