RETIREMENT PLANNING IN TODAY'S ECONOMY

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. Our flagship program, Retirement Planning in Today's Economy, 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.

RETIREMENT PLANNING IN TODAY'S ECONOMY

is a comprehensive personal financial course designed to help explain retirement plans, prepare for market volatility, and budget strategically for the retirement they envision.

DEMOGRAPHIC REACHED

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

TOPICS COVERED

- Income Planning
- Investment Planning
- HealthCare Planning
- Tax Planning
- Estate Planning

OUR PROCESS

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

EACH COURSE INCLUDES:

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

GET STARTED

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ADVISOR