Course Information

INSCE031 Post-Retirement Planning for Seniors

Continuing Education
Course Syllabus

Course Title:	Post-Retirement Planning for Seniors
Course Number:	INSCE031
Course Description:	This course is designed as a continuing education elective course for financial planners, and agents. Work at your own pace with your instructor available via e-mail or telephone as needed. **Units covered include:** The Importance of post-retirement, Cheap Living, Managing Social Security, Managing Personal Investments, Managing Retirement Plan Distributions, Health Care and Important Qualities of a Financial Professional.
Location:	Completely Online
Available:	24/7, 365 days a year
Course Length:	1 month

Course Goals

The primary goals of this course is to provide an intermediate level experience to the Financial Retirement Agent which includes all of the following:

1. To develop high ethical standards of conduct among Public Adjusters Agents, that can result in meeting and exceeding the minimum ethical standards required by the state's insurance regulations

2. To meet the fiduciary responsibilities through vigilant compliance to insurance laws and regulations

3. To acquire an in depth knowledge of the insurance regulations especially in the areas pertaining to the conduct of Public Adjusters

4. To commit to a high level of integrity and ethics in our relationships with Insureds, Insurers, other insurance practitioners and vendors

5. Lastly, to embody the attributes of ethical conduct learned in this course in order to overcome the challenges inherent in the altruistic nature of an insurance professional

Instructor Information

Instructor:	Larry Hartmann, CLU
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Biography:	Larry Hartmann, CLU, has been teaching in the insurance industry for over twenty years. He has taught for American School of Business, Professional School of Business, Eagil Financial Group, The Diversified Companies and H&H Consultants Inc. He has also worked for Buck

Consultants, Continental Insurance Corporation, New England Life – Massachusetts Mutual, Connecticut General and Edwards and Hanly. He holds a MBA degree in Management from Fairleigh Dickinson University. He also holds a Bachelor of Science degree from Wagner College in Economics. He holds the CLU from American College. He is also a Certified Instructor in both New Jersey and Florida.

Course Outline

Lesson	Title	Hours
1	The Importance of Post-retirement Planning	0.25
2	The cheap Living Fairytale Exposed	0.40
3	Managing Social Security	1.00
4	Managing Personal Investments	0.25
5	Managing Retirement Plan Distributions	1.00
6	Health Care	2.00
7	The Important Qualities of a Financial Professional	0.10
	Total Hours	5 hrs