



Financial Planning Series

Financial Planning: Mutual Fund Investing (CIC 1280) Course fee \$20

Nearly everyone has some investment in mutual funds and the world of mutual funds is immense. How should you approach these financial vehicles in retirement? This course shows how mutual funds continue to be valuable financial tools--even into retirement. Covering both bond and stock mutual funds, topics will include understanding mutual funds, the pros and cons of investing in the market, mutual fund strategies in retirement, and how to make financial decisions concerning mutual funds. Call for schedule.

Financial Planning: Annuities, Myths and Misconceptions (CIC 1274) Course fee \$20

There are many different kinds of annuities being sold and many are difficult to understand. This class demystifies this complex topic and covers index, fixed, and variable annuities, the pros and cons of annuity investing, annuity strategies, and purchase decisions. Call for schedule.

Financial Planning: Financial Decision Making for Women (CIC 1273) Course fee \$20

Specifically designed for women who are at or near retirement, this course discusses investment jargon, understanding investment products, proper asset allocation, clarifying investment risk, estate planning, and estate tax issues. Call for schedule.

Financial Planning: Financial Planning for Retirees (CIC 1272) Course fee \$20

Finally: a simple yet informative class that focuses on the pressing needs of today's retirees. This class takes a unique, comprehensive look at issues facing individuals at or near retirement, addressing essential areas such as financial products – equities and bonds, proper allocation and investment risk, life insurance, mutual funds and annuities, estate planning, tax issues, and long term care planning. Handouts and helpful literature will be provided. Call for schedule.

Do you belong to a group or organization that would be interested in this series? Let us bring the training to you! Call for details.

For additional information or to register, please contact Sonia Young at (803) 981-7372 or syoung2@yorktech.edu.