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LTSave Retirement Education Program

At LTSave, we recognize the importance of cost-effectively serving of needs of employers -- and their employees -- who are seeking advice for retirement planning. We also recognize the need for on-going support throughout the retirement planning life cycle. As a result, we have developed the LTSave Retirement Education Program (REP). This program is designed to:

- *Ensure retirement plan participants are afforded with an easy-to-understand and actionable retirement planning education.*
- *Integrate classroom instruction with a practical hands-on LTSave Retirement Planner workshop.*
- *Allow training participants to develop their personal retirement plans following their educational session.*

If you'd like to participate in this education offering, or simply have questions, please contact Vice President Eugene L. Bailey by telephone (ext. 204) or email (gbailey@ltsave.com)



Program Modules

- Introduction
- Goals for Retirement
- Creating Retirement Income
- Retirement Realities
- Saving for Retirement
- Investing for Retirement
- Creating a Retirement Plan
- Other Things to Plan For
- Using Our Retirement Planner
- Wrap-up

Benefits

- **Goal-Oriented Curriculum** *Course offering designed to assure plan provider and plan sponsor education goals have been met.*
- **Experienced Instructors** *Curriculum led by LTSave's executive leadership team, all of whom possess extensive experience in investment advisory services, the financial services industry, and in financial education.*
- **Independent View** *Advisory panel of industry experts available to address specific aspects regarding curriculum design, delivery and/or content.*
- **Cost-Effective Learning** *On-site and distance-learning mediums are available. Travel expenses are minimized.*



LTSave
Advice for Retirement

LTSave, Inc. is the leader in providing retirement planning education and advice. The company's service provides comprehensive retirement education and specific, independent financial planning advice. Available directly by subscription and through employers, individuals who use LTSave can make informed investment decisions for retirement based on specific, objective recommendations.

