Educational Opportunities Provided by University of Southern Indiana’s Outreach and Engagement

HOW TO REGISTER

By Phone
Using VISA, Discover, MasterCard or American Express, call between the hours of 7:30 a.m.–5:30 p.m., Monday–Thursday; 7:30 a.m.–4:30 p.m., Friday.
Phone: 812-464-1989 or 800-467-8600

By FAX
Using VISA, Discover, MasterCard or American Express, fax the completed registration form.
FAX: 812-465-7061

Online
Using VISA, Discover, MasterCard or American Express, register for a course day or night at our website:
USI.edu/continuinged

QUESTIONS? Call 812-464-1989 or 800-467-8600
Email: outreach@usi.edu

University of Southern Indiana is an affirmative action/equal employment opportunity institution.

By Mail
Mail completed registration form with check or money order, payable to USI, or credit card information to:
Continuing Education
University of Southern Indiana
8600 University Boulevard
Evansville, Indiana 47712

Purchase Order/Invoice
Organizations may register employees by telephone by supplying complete billing information. Call 812-464-1989 or 800-467-8600.

Walk-In
In-person registration by check, cash or credit card can be completed at:
USI Continuing Education
University Center East, room 2227
from 7:30 a.m.–5:30 p.m., Monday–Thursday;
7:30 a.m.–4:30 p.m., Friday.

QUESTIONS? Call 812-464-1989 or 800-467-8600
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Outreach and Engagement
8600 University Boulevard
Evansville, Indiana 47712
1-800-801-2155
P15-114088

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FALL 2015

PASSPORT to Retirement

CPEs for accountants available!
PASSPORT TO RETIREMENT®

Preparing for retirement is probably the single most important concern most people have today. Costs are rising, the future of Social Security is uncertain and many people have not accumulated the savings they will need to enjoy the retirement lifestyle they deserve. Are you on track for enjoying the retirement of your dreams, or do you need to improve your knowledge and acquire the know-how it takes to manage your money wisely and to pursue your retirement goals? Join investment professionals for this introduction to the concepts and practices that will help make your retirement comfortable and free from money worries. You’ll learn how to get the most from guaranteed investments, tax-free income and estate planning. For those already retired or planning to retire in the next 10 years, the seminar takes a conservative approach to wise money management in addition to identifying lifestyle issues facing mature Americans. An in-depth workbook with valuable exercises and worksheets is included.

NOTE SPECIAL FEES FOR COUPLES AND FOR EARLY REGISTRATION.

DATES, TIMES AND LOCATIONS:

ALP501A: 3 Wednesdays, October 14, 21 and 28, 6–8:30 p.m.
ALP501B: 3 Wednesdays, November 4, 11 and 18, 6–8:30 p.m.

REGISTRATION Fee: $89 for an individual or $49 for registering at least one week in advance.

What your enrollment fee entitles you to:

• Over eight class hours (three sessions) with a licensed financial services professional with more than 27 years of financial planning experience
• A 135-page workbook to assist you with concepts and to use as a reference tool
• A private, confidential consultation with the instructor to review your goals, analyze your investments and answer your questions regarding one of the most important planning stages in your life

CLASS CURRICULUM

Session 1
• Roadblocks to retirement
• Defining retirement
• How much will retirement cost
• Considering your sources of income
• Basic Social Security information, including taxation

Session 2
• Distributions from your sources of income
• Education regarding investments (stocks, bonds, annuities, mutual funds)
• Education regarding types of accounts (401k, IRAs, estate plans, etc.)

Session 3
• How to protect your wealth
• Education regarding insurance (life, health, long-term care, disability, liability, etc.)
• Planning for incapacity
• Managing your estate (assets, beneficiaries, trusts, taxes, probate, wills)

SOCIAL SECURITY PLANNING FOR BOOMERS: WHAT EVERYONE NEEDS TO KNOW

After being told for years that Social Security is going broke, baby boomers are realizing that it will soon be their turn to collect. Decisions you make now can have a tremendous impact on the total amount of benefits you stand to receive over your lifetime. This informative seminar covers the basics of Social Security and reveals strategies for maximizing your benefits including:

• Factors to consider when deciding when to apply for benefits
• Why it makes sense to delay benefits—and when it does not
• How you should always check your earnings record for accuracy
• How to estimate your benefits
• How to coordinate benefits with your spouse
• How to minimize taxes on Social Security benefits
• How to coordinate Social Security with your other sources of retirement income

DATES, TIMES AND LOCATIONS:

ALP502A: Wednesday, October 7, 6–7:30 p.m.
ALP502B: Monday, October 12, 6–7:30 p.m.
ALP502C: Monday, October 19, 6–7:30 p.m.
ALP502D: Monday, October 26, 6–7:30 p.m.

Location: USI University Center East, Rooms 2217-2218

REGISTRATION Fee: $19 for an individual or $24 for two registering together.

What your enrollment fee entitles you to:

• Over one-and-one-half hours of class time (one session) with a licensed financial services professional with more than 27 years of financial planning experience
• A six-page resource handout with tips and tricks regarding Social Security
• The option of a private, confidential meeting with the instructor

CLASS CURRICULUM

• Will Social Security be there for me?
• How much can I expect to receive?
• When should I apply for Social Security?
• How can I maximize my benefits?
• How will my benefits be affected by taxes?
• Will Social Security be enough to live on in retirement?