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#2953 Advisor's Guide to Planning for the Baby Boomer Client

CFP Board Course ID#195511

Course Information

Course descriptions and objectives:

The evolving financial landscape demands an immediate re-evaluation from any financial services professional who looks forward to serving Baby Boomer clientele. Discover the unique biology, psychology, sociology and demography of this populous, maturing segment. As a Registered Financial Gerontologist and experienced practitioner, the author delivers age-sensitive strategies based on applied research.

Number of CFP® continuing education credit hours recommended for this course: 7

Beacon Hill Financial Educators CFP Board sponsor number: **1008**
CLU, ChFC/PACE Recertification: 7 credit hours.

Subject Codes: CFP Board of Standards, Inc.; *Retirement Planning and Strategies*
NAPFA: *Retirement Planning and Employee Benefits*

Course Materials

Course text: *How To Plan for Baby Boomers: Advisor's Guide to the New Retirement Model*
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Final exam (online): sixty questions.

Level of Complexity

Overview (programs that provide a general review of a subject from a broad perspective or dive into basic knowledge on a specific skill or topic. Best suited for CFP® professionals seeking knowledge in an unfamiliar subject area and with entry level experience.)

Instructions for Taking the Final Exam Online

- Login to your account online at www.bhfe.com.
- Go to "My Account" and view your courses.
- Select "Take Exam" for this course and follow instructions.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

As a result of studying the following assignments, you should be able to meet the learning objectives listed below.

- Define the Baby Boomer generation.
- Differentiate between Baby Boomers and other generations.
- Recognize the characteristics of Baby Boomer clients that are relevant to the financial planning process.
- List the major planning issues that should be addressed with Baby Boomer clients.
- Recall the primary investment concerns that are particularly important to Baby Boomer clients.
- Recognize the important retirement planning issues that should be considered when advising Baby Boomer clients.
- Define the Social Security benefits that will be available to Baby Boomer clients and their surviving spouses.
- List the important components of a financial plan being prepared for a Baby Boomer client.

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