

COURSE SYLLABUS

Getting the Most Out of Your Retirement

Course Description

This course provides fundamental working knowledge of tax-efficient strategies regarding retirement planning. You will gain access to information that will address the complexities of navigating retirement issues such as social security, taxation, inflation, longevity concerns, and so much more.

This is not a financial sales seminar; this is a financial course of study (with some great food!) where you will leave with the knowledge that can help you make sound decisions about your retirement efficiency planning.

Course Objectives

The objectives of this course are to provide you with the tools, insight, and strategies that will help you make informed decisions about Social Security so that you can maximize your benefit. By the end of this course, you should be able to understand:

- 1. Why taxes are headed sharply higher**
- 2. The role Social Security plays in your overall retirement income and what causes it to become taxable**
- 3. The strategies to best insulate you from inevitable tax increases**
- 4. What vehicles are best poised to create tax-free retirement income**
- 5. The largest risks in retirement and how taxes exacerbate each of them**

COURSE OUTLINE

- **Quantifying your retirement tax bill**
- **Creating a foundation of tax-free guaranteed income that you cannot outlive**
- **Reducing taxes on your social security, even after claiming**
- **Increasing the longevity of your assets while decreasing overall risk**
- **Making your retirement assets work together holistically, reinforcing your retirement goals**

Research

To maximize the value of the course, you will be provided with multiple research papers that will provide you with critical information that will help guide you through retirement myths on taxes in retirement, how to maximize your retirement income through tax-efficiency, and a summary of what we went over in class.

Participation

This course is designed to be interactive and your participation is encouraged, but not required. However, if you are looking for answers to questions about your retirement, then the best way to profit from this course is to take notes and participate in the classroom discussions as you feel comfortable.



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Instructor

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I'm Kristen Cooper, owner and president of Axios Capital Strategies. I'm a recognized and respected authority on retirement planning. I'm excited to invite you to my Tax-free Retirement Planning event. Tax-free wealth management is my firm's core competency. Having retired hundreds of times (through my clients), I know what works and what tends to fall short. Call me a nerd, but I love this stuff. I love helping my clients. Have you ever noticed how you are only great at the things you are passionate about?

My firm's commitment to our clients creates clarity and confidence in their lives.

More importantly, I've been married for over 24 years. My husband and I have 5 wonderful daughters, 2 destructive but lovable dogs, 2 wild mustangs, and 1 suicidal cat.

When I'm not working with my clients, you might spot me at Lake Powell, around town taxiing my kids between events, or (hopefully) sitting quietly on the deck reading a new book.

I look forward to meeting you at my event. Come shake my hand and say hello. We'll have some fun and learn together.