BEDROCK
BUSINESS RESULTS

Coaching Services

Equipping advisors to prepare clients for retirement health care.

Health care in retirement has emerged as pre-retirees' top concern. By eliminating the confusion over Medicare, custodial care and overall costs, financial advisors can bring peace of mind to their clients. Top advisors recognize that understanding the convergence of health care and financial planning is essential to holistic wealth management.

- **Five one hour webinar sessions:**
    - I. Overview of Medicare
    - II. Building retirement health care cost into your clients' financial plans
    - III. Accumulation strategies – Health Savings Accounts, Roth, Tax Efficient Investing
    - IV. Custodial Care
    - V. Action plan to connect with clients and gather assets

The webinar content will focus on the key financial planning considerations that impact retirement health care. Recognizing that advisors do not aspire to be retirement health care consultants with their clients, the content strikes a balance with a high-level overview of Medicare, while taking a deeper dive into financial planning considerations. These considerations include: the impact of Medicare on retirement income, calculating a realistic health care cost, effective use of health savings accounts and custodial care solutions.The wrap up session will describe a tangible plan of action to prioritize and implement health care conversations with clients and prospects.

- **Copy of Peter Stahl's book: *Top of the First – The Convergence of Health Care and Financial Planning***

This 75-page hard cover book, updated in 2017, follows the content and flow of the webinar based training. It is a valuable resource to build advisor knowledge. By speaking directly to the consumer, it provides an ideal means for advisors to connect with clients on important retirement health care concepts. Advisors can purchase additional copies at a discounted rate.

- **12-month subscription to the WealthWatch video library and resource center.**

These professionally scripted and filmed videos provide an innovative way for advisors to review and reinforce their retirement health care knowledge. The library consists of twelve 4-5 minute videos. Once again, Peter speaks directly to the consumer, encouraging individuals to connect with their advisor on these important topics.

- **4 hours of CFP® credit**

After completing the webinars and reading *Top of the First*, advisors can take a 50-question multiple choice exam and earn 4 hours of CFP® continuing education credit.

www.bedrockresults.com | pfstahl@bedrockresults.com | 610-357-5548