Training Course on Retirement Management Advisor (RMA) Certification

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Retirement Management Advisor (RMA) Certification is designed to equip financial professionals with the knowledge and skills necessary to effectively guide clients through the complexities of retirement planning and management. This certification focuses on holistic retirement management, helping advisors understand various aspects of retirement income strategies, risk management, and client engagement. By completing this course, participants will be prepared to provide comprehensive retirement solutions that meet the needs of their clients. Participants will explore key topics such as retirement income planning, investment strategies, tax considerations, and social security optimization. The curriculum integrates theoretical concepts with practical applications, featuring case studies and interactive exercises that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-equipped to achieve RMA certification and enhance their advisory capabilities.

Programme Curriculum

Training Course on Retirement Management Advisor (RMA) Certification

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Course Objectives

1. Understand the fundamentals of retirement management and planning.
2. Analyze retirement income needs and strategies.
3. Evaluate investment options for retirement portfolios.
4. Explore tax implications and strategies for retirees.
5. Discuss social security benefits and optimization strategies.
6. Develop skills in risk management for retirement planning.
7. Assess the impact of healthcare costs on retirement funds.
8. Foster effective client communication and engagement strategies.
9. Create actionable retirement plans tailored to client needs.
10. Stay informed about emerging trends in retirement planning.
11. Measure the effectiveness of retirement strategies.
12. Identify tools and technologies for retirement planning.
13. Prepare for the RMA certification examination.

Target Audience

1. Financial advisors and planners
2. Wealth management professionals
3. Retirement plan specialists
4. Investment analysts
5. Compliance officers
6. Actuaries and actuarial analysts
7. Graduate students in finance or financial planning
8. Policy makers in retirement management

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Retirement Management

- Overview of retirement management concepts and principles.
- Importance of retirement planning in financial advisory.
- Key terminology related to retirement income and management.
- Historical context and evolution of retirement planning practices.
- Case studies illustrating successful retirement management strategies.

Module 2: Retirement Income Needs Analysis

- Techniques for assessing retirement income needs.
- Understanding the retirement spending gap and its implications.
- Evaluating different income sources (pensions, savings, investments).
- Real-world examples of income needs assessments.

- Tools for calculating retirement income requirements.

Module 3: Investment Strategies for Retirement Portfolios

- Overview of investment options for retirees.
- Analyzing risk and return profiles of various asset classes.
- Techniques for asset allocation in retirement portfolios.
- Evaluating the role of fixed income, equities, and alternatives.
- Case studies on effective investment strategies for retirement.

Module 4: Tax Considerations for Retirees

- Understanding the tax implications of retirement income.
- Techniques for tax-efficient withdrawal strategies.
- Evaluating the impact of required minimum distributions (RMDs).
- Real-world examples of tax planning for retirees.
- Tools for assessing tax strategies in retirement planning.

Module 5: Social Security Optimization

- Overview of social security benefits and eligibility.
- Techniques for maximizing social security payments.
- Understanding the impact of claiming strategies on retirement income.
- Real-life examples of social security planning.
- Tools for evaluating social security options.

Module 6: Risk Management in Retirement Planning

- Identifying risks associated with retirement (longevity, market, inflation).
- Techniques for mitigating risks through diversification and insurance.
- Developing strategies for managing unexpected expenses.
- Case studies on effective risk management practices in retirement.
- Tools for assessing retirement-related risks.

Module 7: Healthcare Costs in Retirement

- Understanding the impact of healthcare costs on retirement planning.
- Techniques for estimating future healthcare expenses.
- Evaluating options for long-term care insurance and Medicare.
- Real-world examples of healthcare cost planning for retirees.
- Tools for integrating healthcare considerations into retirement plans.

Module 8: Client Communication and Engagement

- Importance of effective communication in retirement planning.
- Techniques for engaging clients in retirement discussions.
- Developing educational materials on retirement strategies.
- Best practices for building client relationships and trust.
- Real-life examples of successful client engagement strategies.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.

- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to FINESKILL TRAINING CENTER account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	11 Sep 2026	Physical	$1,500
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500

Start Date	End Date	Location	Price
19 Oct 2026	23 Oct 2026	Physical	$1,500
26 Oct 2026	30 Oct 2026	Physical	$1,500

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com