

The logo consists of the letters 'FP' in a bold, serif font, enclosed within a dark square.

**Financial Perspectives**  
Centre for Professional Excellence in  
Advisory Competency and Ethics

Course Prospectus

# Retirement Planning Masterclass

## Portfolio Design and Asset Allocation in Retirement Planning

Module 4

### Program Overview

Module 4 delves into the strategic art of designing retirement portfolios using asset-allocation strategies, a cornerstone for effective retirement planning. This module empowers participants to create well-balanced retirement portfolios and uncover opportunities for cross-selling within a client's existing investment framework.

Review the fundamentals of retirement income planning and explore the five essential tools that underpin this process. Learn to apply asset allocation principles to expertly design portfolios for both the accumulation and decumulation phases of retirement. Quantify retirement needs through the FAA-N16 method, providing a solid foundation for informed recommendations. Real-world case studies featuring diverse client profiles will enable participants to apply theory to practice, ensuring a comprehensive understanding of portfolio design for successful retirement planning.



## Course Objectives

- a. Review the retirement income planning process.
- b. Review the five tools that support retirement income planning.
- c. Apply asset allocation principles to design accumulation and decumulation portfolio for the client in the pre-and post-retirement phases.
- d. Quantify retirement needs required under the FAA-N16 to derive a reasonable basis of recommendation.
- e. Put the theory into practice through case studies of five different client profiles.



### Total Training Hours

Upon completion of this program, participants will be awarded the Certificate of Completion and 4 non-core CPD Training Hours



### Who Should Attend?

Financial Planning Professionals, Bank Relationship Managers and Insurance Specialists, Insurance Agents



### Course Fee

\$350 before GST



### Funding

This program is IBF-FTS recognised and is eligible for funding under the IBF-FTS scheme.

## Enquiry and Enrolment



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