OFFICIAL COURSE CATALOG

THE INTELLIGENT RETIREMENT PLAN™

A SMARTER LEAP FROM CAREER INTO YOUR GOLDEN YEARS

WHAT?

Classroom Instruction on Expert Strategies to Enter Retirement Well-Prepared

WHERE?

DFW-Area: UT Arlington, TCC Northeast, TCC Northwest, and Tarleton State Ft. Worth

WHEN?

Multiple Dates Offered in the Spring and Fall Semesters: Details Inside

YOU'LL LEARN HOW TO:

- Identify Critical Decisions that Must be Made *Before* You Retire, Not After
- Reduce or Eliminate Retirement Taxes, Unexpected Expenses, & Legal Challenges
- Create Reliable Retirement Income
- Protect Your Lifestyle from Market Volatility, Inflation, & Preventable Risk
- Align Your Money with the Life & Purpose You Desire in Retirement
- Avoid the Common (& Costly) Mistakes that New Retirees Make in the First 5 Years

TUITION: $69 PER PERSON, TEXTBOOKS INCLUDED

"I came away with so much information on how to keep my assets working for me today through retirement. I sleep better knowing I implemented what I learned in this class."

BRYAN C., FORT WORTH

TARLETON STATE UNIVERSITY

UTA Continuing Education
EXTENSION AND EXTENDED CAMPUS

Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES

TRUSTED EDUCATION FOR A SECURE FINANCIAL FUTURE

WHY ATTEND THIS CLASS?

The years leading up to retirement are unlike any other financial season of life. The decisions you make during this transition will shape your retirement for decades to come. With shifting tax rules, market uncertainty, rising healthcare costs, and longer life expectancies, intelligent planning isn't optional, it's essential.

This course is designed to help you move from your final working years into retirement with a smarter plan. Whether your goal is to protect what you've built, create reliable income, or preserve your lifestyle, this class provides the framework you need to make informed, intentional decisions *before* this new chapter begins.

WHO SHOULD ATTEND?

This education experience is ideal for anyone approaching retirement who wants to feel prepared, not rushed or uncertain, about what comes next. Discover the unique challenges and opportunities that arise as you begin your retirement years.

We break down complex topics into clear, understandable concepts. You'll learn how to make thoughtful choices that align with your values, priorities, and long-term goals. Most importantly, this class empowers you to create your own strategic retirement plan so you begin your retirement with peace of mind.

THIS COURSE INCLUDES ACCESS TO THE FOLLOWING INTERACTIVE RESOURCES:

- Intelligent Retirement Readiness Assessment
- "Paycheck to Purpose" Vision Worksheet
- Final Working Years Planning Checklist
- Retirement Income Mapping Template
- Social Security Timing Decision Guide
- Tax Minimization Strategy Worksheet
- Healthcare & Medicare Decision Timeline
- Long-Term Care Planning Conversation Guide
- Risk & Lifestyle Protection Checklist
- Retirement Spending Confidence Worksheet
- Retirement Transition Action Plan
- Personalized Intelligent Retirement Roadmap™

LETTER FROM A SATISFIED STUDENT

Dear Josh,

Thank you so much for teaching such a fantastic "Intelligent Retirement" class. My husband and I absolutely enjoyed your warm teaching style and all the practical information you shared. We especially loved the part about protecting the lifestyle we've earned and come to enjoy. We were amazed at what we didn't know.

A little about us: we're both in our early 60s, and while we've loved our careers, we're finally ready for the next chapter. Travel has always been a dream of ours, and we already have three trips planned over the next few months. Your retirement budgeting strategies gave us the reassurance we needed to feel certain that we can actually afford to explore the world the way we've always imagined. I even shared your budgeting tool with a few friends because it was so useful.

For the first time, we feel 100% prepared to begin our retirement journey. Thanks to you and your team, we now have a real plan in place… AND an official retirement date!. We're so excited that we even put a countdown clock on our refrigerator!

By the way, the textbook has been our go-to resource when we need to refer back to what we learned. The charts, examples, and website references have been invaluable. I've made so many notes in mine that the whole book is covered in my handwriting… I may need a second copy soon!!

The biggest gift of all was the ability to meet with you after the class and get private advice and direction. We are genuinely grateful for your guidance, and we're looking forward to seeing you again soon.

All the best,
Gary and Elizabeth J., Arlington

WHAT STUDENTS ARE SAYING ABOUT THIS COURSE

"I thought I was ready for retirement before this class, but now I'm sure I am ready. The teacher was very knowledgeable and answered all of my questions, especially my worries about market volatility. Highly recommend for anyone wanting to retire with confidence!"

TIM B., ALEDO

"When my husband and I took this course, he was one year from retirement. Everything we learned we were able to apply immediately, and made his retirement a thousand times better. Some of our friends have taken this course as well, and found it to be invaluable."

KERRY B., GRAND PRAIRIE

THE INTELLIGENT RETIREMENT PLAN™ COURSE PREVIEW

INTELLIGENT RETIREMENT 101

Retirement isn't a single moment; it's a meaningful transition that touches finances, identity, and daily life. We begin by exploring why the final working years matter so deeply, and how to reframe retirement as a purposeful shift, not a leap of faith.

ENVISION LIFE AFTER WORK

Before making financial decisions, it's essential to clarify what you want your retirement to look and feel like. This section helps you define what fulfillment, freedom, and purpose mean to you so that your plan supports the life you truly want, not someone else's version of retirement.

SHIFT FROM SAVING TO LIVING

After decades of saving, the shift to spending can feel unsettling. This section teaches why retirement income works differently from a paycheck, and how structure creates peace of mind. Learn how to use your assets intentionally, without fear of making the "wrong" move.

CREATE DEPENDABLE INCOME

Retirement income often comes from multiple places, and how those pieces fit together matters. Learn how Social Security, investments, and other income sources can be coordinated to create stability so that your money supports your lifestyle, even when markets and life change.

PROTECT WHAT YOU'VE BUILT

Taxes don't disappear in retirement, but they do change. This section explains why tax decisions made before and just after retirement can have lasting consequences. You'll gain understanding on how proactive planning helps preserve wealth, reduce unnecessary taxes, and support a more confident long-term strategy.

PLAN FOR HEALTH & WELLNESS

Healthcare decisions can feel intimidating, especially during retirement. This section provides a clear, calm overview of healthcare planning, Medicare timing, and long-term care, helping you prepare thoroughly while maintaining independence, dignity, and peace of mind.

PREPARE FOR LIFE'S "WHAT-IFs"

Retirement introduces new risks, but it also offers new opportunities for thoughtful protection. In this section, you'll learn how to manage market volatility, inflation, and longevity risk without sacrificing flexibility. The focus is on protecting the lifestyle you've worked so hard to create, while staying adaptable as life evolves.

DESIGN POST-CAREER PURPOSE

Retirement is about more than money; it's about meaning. This section explores how to create structure, purpose, and engagement after leaving a career. You'll consider how time, relationships, contribution, and legacy shape a fulfilling retirement, helping you step into this next chapter with intention and joy.

BUILD A RETIREMENT ROADMAP

In the final section, everything comes into focus. You'll reflect on the key decisions of the retirement transition, clarify your priorities, and identify next steps. The goal is simple: to help you move forward feeling prepared, grounded, and ready to build your own Intelligent Retirement Roadmap™ to confidently leap from paychecks to purpose.

SYLLABUS: OFFICIAL COURSE OUTLINE

I. A SMARTER RETIREMENT FOUNDATION

- Reframe Retirement as a Chapter, Not a Date
- Why the Final Working Years Matter More than Most People Realize
- Emotional, Psychological, & Financial Shifts
- Common Myths About Retirement Readiness
- What a "Successful Retirement" Truly Means

II. YOUR VISION FOR LIFE AFTER WORK

- Designing the Next Chapter with Intention
- Defining Fulfillment, Freedom, & Purpose in Retirement
- How Lifestyle Goals Influence Financial Decisions
- Balance Personal Goals, Marriage Dynamics, & Family Considerations
- Aligning Values with Money Choices

III. ACCUMULATION TO DISTRIBUTION

- Shifting from Saving to Spending Confidently
- How Retirement Income Differs from Saving
- Sustainable Income & Withdrawal Strategies
- Income Sources for Efficiency & Stability
- Avoid the Fear of "Spending Too Much"

IV. RELIABLE RETIREMENT INCOME

- Making Everything Work Together
- Social Security Timing & Coordination
- Pensions, Investment Income, & Other Cash Flow Sources
- Creating Predictable Retirement Income in an Unpredictable Market
- Planning for Flexibility as Life Changes

V. TAX REDUCTION DURING THE SHIFT

- Protecting What You've Built
- How Taxes Change After Your Paycheck Stops
- Key Tax Strategies Before Retirement Begins
- Tax Diversification & Future Tax Risk
- Avoid These Common Tax Traps that New Retirees Fall Into

VI. HEALTHCARE, MEDICARE & LONG-TERM CARE PLANNING

- Preparing for the Unknown, Without Fear
- The True Cost of Healthcare in Retirement
- Understanding Medicare Decisions & Timing
- Thoughtful & Realistic Long-Term Care Plans
- Protecting Assets While Keeping Your Independence & Dignity

VII. LIFESTYLE & RISK MANAGEMENT

- Preserving Stability Through Change
- Managing Market Volatility During Early Retirement Years
- Inflation, Longevity, & Sequence-of-Returns Risk
- Protection Strategies in Retirement Planning
- Preparing for Unexpected Life Events

VIII. PURPOSE & FULFILLMENT

- Creating a Life You'll Love After Work
- Meaning, Contribution, & Identity Post-Career
- Routines for Joy, Health, & Engagement
- Giving, Legacy, & Family Involvement
- The "Retirement Letdown" that Many Don't Anticipate

IX. PLAN YOUR OWN LEAP FORWARD

- Review the Key Decisions Necessary During Your Entrance into Retirement
- When & How to Seek Professional Guidance
- Creating a Clear Personalized Retirement Planning Roadmap™ for Your Next Phase

THIS COURSE INCLUDES EVERYTHING YOU NEED TO LEARN

TRUE CLASSROOM EXPERIENCE

The Intelligent Retirement Plan™ is designed to be both enjoyable and deeply informative. Led by a CERTIFIED FINANCIAL PLANNER™ and fiduciary expert, the material is filled with practical insights and real case studies. The setting encourages open discussion, allowing you to ask questions and fully engage in the learning experience.

COMPREHENSIVE EDUCATION

Unlike typical financial seminars that only cover one topic, this program helps you understand the "big picture". You'll explore all the elements of entering retirement and how they work together to create an seamless shift into your next chapter. The class is purely educational, and no financial products are discussed, promoted, or sold.

HANDS-ON LEARNING GUIDE

You'll receive a course textbook created by your instructor filled with examples and interactive content to help understand each concept with ease. Written in clear, accessible language, this book is yours to keep and will serve as a reliable home reference long after class is over.

ONE-ON-ONE EXPERT SUPPORT

For personal questions or a deeper look into smarter retirement planning for your unique situation, you'll have the option to meet one-on-one with your instructor at no additional cost. This private session is offered exclusively to students and is completely optional, but is not required.

MEET YOUR INSTRUCTORS

JOSH W. STRITTMATTER, CFP® CRC®

Josh has been teaching retirement planning and several other financial subjects at DFW-area colleges and universities since 2010. His passion is education, and he believes knowledge and financial literacy are important for each and every person at all stages of life.

KELLY BUCHFINK, CFP®

Kelly has been in the financial industry since 2001 and enjoys applying her experience and expertise to helping others. She finds teaching extremely rewarding, and hopes that her students gain knowledge and inspiration to help them meet their financial goals.

IN PRAISE OF THE INTELLIGENT RETIREMENT PLAN™

"I walked into this class overwhelmed and unsure where to start. By the end, I finally had some real, actionable advice about my retirement shift. The worksheets, guidance, and explanations made everything feel doable. For the first time, I feel confident and excited instead of anxious about the years ahead. This course was truly life-changing."

KEITH S., KELLER

"I've taken financial classes before, but none compare to this. It addressed every question I had, and even many that I didn't even realize I should be asking. The retirement income module was especially eye-opening. For the first time, I understand how to turn my savings into dependable retirement income. I wish I could've taken this class years ago."

JEFF A., RICHARDSON

"As a widow preparing for retirement on my own, I desperately needed some expert guidance that I could trust. This course broke everything down step-by-step and gave me reassurance I didn't think I could feel about my finances. The teacher's kindness and expertise were incredible. I now have a plan, and finally some hope, for my next chapter."

JULIE G., BENBROOK

"My husband and I took this class together, and it sparked the most productive financial conversations we've had in decades. We finally feel aligned about our goals and we're starting to build a more strategic retirement plan. This class literally transformed our fears into action. If you're nearing retirement, take this class!! It's the best investment you can make."

MONICA N., BEDFORD

Click the button below to view available class dates and to begin registration.

CLICK TO REGISTER

Can't access the button above? Visit: financialclass.org/retire-dates to sign up.

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PLAN A SMARTER SHIFT FROM CAREER TO GOLDEN YEARS

REGISTER TODAY TO LEARN HOW TO:

- Confidently transition from paychecks to living on your retirement assets
- Understand how taxes change in retirement & how to plan for them
- Prepare for healthcare costs & Medicare decisions without confusion
- Protect your lifestyle from market volatility, inflation, & unexpected risk
- Align your money with the life & purpose you want in retirement
- Replace anxiety with a smart, structured plan for your retirement years

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