

EAST TEXAS ESTATE PLANNING COUNCIL

COUNCIL MEETING: Wednesday, October 17, 2018

WHERE: Hollytree Country Club

TIME: Register and Lunch: 11:30 AM – 12:00 PM
Program: 12:00 PM – 1:00 PM

SPEAKER: Michael Finke, Ph.D., CFP®

TOPIC: “Retirement Income Planning in a Low-Return World”
The objective of this presentation is to recognize the life cycle implications of a sustained low return environment on retirement planning.



Michael Finke, Ph.D., CFP® is the Dean and Chief Academic Officer at The American College of Financial Services.

Dr. Finke completed his doctorate in consumer economics at The Ohio State University in 1998 and in finance from the University of Missouri in 2011. Before serving as the Dean and Chief Academic Officer, he was the director of the Retirement Planning and Living Center program and the director of graduate studies at Texas Tech and at the University of Missouri.

His research includes studies of retirement savings and investment behavior, optimal retirement income and annuitization strategies, regulation of financial advice, financial literacy in old age, and most recently of life satisfaction among retirees. He received the award for the most influential paper published in the Journal of Financial Planning in 2013 and 2014.

Dr. Finke also writes monthly articles translating academics topics for practitioners in his role as contributing editor for Research Magazine. He is a frequent speaker at academic and financial services conferences on retirement topics and is considered one of the leading experts on income strategies and planning issues related to aging.

C. E. CREDIT: No prerequisites required.

CPAs: One hour
Attorneys: One hour

CFP: One hour
CLU: One hour - based on course content

Please RSVP no later than Friday, October 12, 2018.
Cancellations must be made prior to 12:00 noon on Tuesday, October 16, 2018.
Please be prepared to pay for your meal at the time of meeting.

Member(s) Attending: _____

If bringing Guests, how many? _____

Please provide the names of your guests: _____

Buffet Style Lunch – Cost \$20.00 (Due at time of meeting)

MAIL, PHONE, FAX, OR E-MAIL YOUR REPLY TO:

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