

New for 2023

TWO-DAY ADVISOR RETIREMENT BOOTCAMP



THRIVE® UNIVERSITY hosted by:

Curtis V. Cloke, Adjunct Professor at The American College of Financial Services



Thrive University **Live**

Date: August 8-9, 2023

Time: Day 1, 8 – 5PM

Day 2, 8 - Noon

Location:

4301 Anchor Plaza Pkwy
#450, Tampa, FL, 33634

Register online with QR Code today!

Topics Covered:

- Cycle of Decision - "Words and Mindset that Matter" - An Emotional Connection
- Understanding the Three Meeting Process – Five Fears – Five Risks, Discovery, Close
- Knowing when to use retirement income strategies of; SWIP, BUCKET, FLOOR
- Decision Tree of understanding: Income Allocation vs Growth Allocation vs Liquidity
- Identifying Tax Mistakes and Mythical missteps vulnerable to advisors and clients
- Safe Withdrawal Rates and FREE THE HOSTAGES (A story of creating real liquidity)
- Buy Income – Invest the Rest – Powerful concepts of utilizing a Hybrid strategies
- Are there any real rules of Thumb regarding when to take Social Security....?
- The Power of Using Income Bridging – Social Security Delay & Roth Conversions

Sponsored by



THRIVE® UNIVERSITY registration **\$2,000**

Attendee responsible
for hotel & travel

For more info., contact Michele Gebhardt Ph: 515-298-4748