

1. Record Nr.	UNINA9910458279603321
Autore	Robbins Eric J.
Titolo	Essentials of retirement planning : a holistic review of personal retirement planning issues and employer-sponsored plans / / Eric J. Robbins
Pubbl/distr/stampa	New York, New York (222 East 46th Street, New York, NY 10017) : , : Business Expert Press, , 2014
ISBN	1-63157-032-3
Edizione	[First edition.]
Descrizione fisica	1 online resource (326 p.)
Collana	Finance and financial management collection, , 2331-0057
Disciplina	646.79
Soggetti	Retirement - Planning Electronic books.
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Part of: 2014 digital library.
Nota di bibliografia	Includes bibliographical references (pages 297-302) and index.
Nota di contenuto	Part I. Retirement plan overview -- Chapter 1. Crisis of financial unawareness and a 30,000-foot view -- Chapter 2. The retirement landscape -- Chapter 3. Initial concerns in retirement planning -- Chapter 4. Defined benefit plan types and money purchase pension plans -- Chapter 5. The world of defined contribution plans -- Chapter 6. Plans for small businesses and nonprofits -- Part II. Retirement plan design -- Chapter 7. Coverage, eligibility, and participation rules -- Chapter 8. Designing benefit offerings -- Chapter 9. Plan loans, vesting, and retirement age selection -- Chapter 10. Death and disability planning -- Chapter 11. Plan funding and investing -- Chapter 12. Fiduciary responsibility -- Part III. Retirement plan administration -- Chapter 13. Plan installation and administration -- Chapter 14. Plan terminations -- Part IV. Special plan types -- Chapter 15. Nonqualified deferred compensation plans -- Chapter 16. Equity-based compensation -- Chapter 17. Introduction to IRAs -- Chapter 18. IRAs in depth -- Part V. Comprehensive retirement planning -- Chapter 19. A holistic view of retirement planning -- Chapter 20. Social security -- Chapter 21. Retirement needs analysis -- Chapter 22. Housing, medicare, and long-term care concerns -- Chapter 23. Retirement distribution planning -- Chapter 24. Managing distribution options -- Appendix -- Notes -- References -- Index.

This book provides the quintessential information needed to understand the financial side of the retirement planning coin. You'll begin by learning about the various plan types employers may offer their employees. Topics related to compliance testing will be thoroughly discussed as well as strategies used to legally shift benefits in favor of highly compensated employees (HCEs). However, some employers do not sponsor a plan. In this instance, retirement savers will need to understand the options available within the world of individual retirement accounts (IRAs). This book is not intended to provide investment advice, but rather to guide how different retirement savings vehicles function and how they can be effectively deployed. Many financial professionals find that their clients ask questions about all aspects of their financial life. For this reason, this book also discusses non-investment-related topics such as housing options, Social Security planning, Medicare planning, and a few other basic insurance-based issues faced by all retirees.
