WHEREVER YOUR RETIREMENT WILL TAKE YOU, WE'LL HELP YOU GET THERE.

Join us for our evening information seminars.

By registering for our comprehensive classes, you'll learn the keys to successful retirement and financial planning. To register scan the QR code, call or visit us online:

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University of Dayton
Special Programs and Continuing Education

300 College Park
Dayton, Ohio 45469-7011

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Register now for our 2026 financial and retirement planning classes — take charge of your future!

FINANCIAL STRATEGIES FOR SUCCESSFUL RETIREMENT®

Sponsored by the University of Dayton's Office of Special Programs and Continuing Education

University of Dayton
Special Programs and Continuing Education



HAVE YOU COMMITTED TO CREATING A MORE INTELLIGENT FINANCIAL STRATEGY THIS YEAR?

TAKE CHARGE OF YOUR RETIREMENT.

The University of Dayton's Office of Special Programs and Continuing Education is sponsoring classes in 2026 on the following dates. Choose one weekday that works best for all your sessions:

MONDAYS:
February 23, March 2, 9 and 16

TUESDAYS:
January 27, February 3, 10 and 17

WEDNESDAYS:
February 25, March 4, 11 and 18

THURSDAYS:
January 29, February 5, 12 and 19

All class times are 6:30–8:30 p.m.

2026

COURSE AGENDA

FINANCIAL BASICS
- Retirement income: perceptions and reality
- Nine steps to build a financially successful retirement
- Using credit wisely
- Making your money last

YOUR RETIREMENT INCOME
- Sources of retirement income
- Social Security and you
- The value of tax-deferred contributions
- Personal retirement plans
- Traditional IRAs
- Roth IRAs
- Taking money out of employer retirement plans

INVESTMENTS
- Emergency reserves
- Stocks
- Mutual funds
- Tax-deferred annuities
- Asset allocation

RISK MANAGEMENT
- Ways to manage risk
- Health insurance and Medicare
- Long-term care
- Company benefits
- Types of life insurance

ESTATE PLANNING
- Importance of estate planning
- Distributing assets at your death
- Joint ownership
- Trusts
- Wills
- Probate
- Taxes and your estate

Through our class, you'll learn how to better manage your money — so you can enjoy your retirement worry-free. You'll learn to assess your current financial situation and develop a personalized plan to reach your retirement goals. After attending the course, you're entitled to a personal retirement planning consultation.

The major topics we'll cover in this comprehensive class include financial basics, retirement income, investments, risk management and estate planning.

Our class will also give you strategies to answer these questions:
- How much money will I need to retire?
- Can I retire early?
- How can I minimize my taxes?
- How will I manage my plan?
- How important is it to plan my estate?

INSTRUCTORS

Our local course instructors are from UBS Financial Services Inc., member of FINRA and SIPC. They draw upon real-life experiences with numerous clients and are licensed in the areas of investment securities and insurance.

REGISTRATION

To enroll, call us, scan the QR code, enroll online or complete the attached form and fax or mail it to us.

Phone: *937-229-2347*

Fax: *937-229-3500*

Online: *continuingeducation.udayton.edu*

Mail: *Special Programs and Continuing Education 300 College Park, Dayton, OH 45469-7011*

Scan the QR Code:

TUITION

Tuition is $69, and you can bring a spouse or friend for free. You can pay up until the first day of class, and there is a cancellation fee of $25.

You must register early, and we'll send you a confirmation letter after you register. The letter will provide details about the location and parking.

Individual Retirement Planning Consultation

Everyone who attends this course is entitled to a personal retirement planning consultation after the course.

REGISTRATION FORM

I will attend **Financial Strategies for Successful Retirement**.

❑ Mondays: February 23, March 2, 9 and 16
❑ Wednesdays: February 25, March 4, 11 and 18
❑ Tuesdays: January 27, February 3, 10 and 17
❑ Thursdays: January 29, February 5, 12 and 19

Please fill out the information below:

❑ Please remove me from your mailing list.

Name _____
Address _____
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Daytime phone _____ Home phone _____
Email address _____ Date of birth _____

❑ I am enrolling my spouse or guest at no extra charge Name _____

Method of payment

❑ Check enclosed payable to **University of Dayton** ❑ Visa ❑ MasterCard ❑ Discover

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Return to: University of Dayton Special Programs and Continuing Education, 300 College Park, Dayton, OH 45469-7011