NEWS

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Fidato Wealth Announces Online Interactive Retirement Planning Course

CFP® Tony D'Amico to Teach Proven Financial Planning Strategies through Lorain County Community College

Middleburg Heights, Ohio – June 11, 2020 – Throughout history, society has gone through pandemics, times of social unrest and stock market volatility, which create uncertainty in planning for the future. One thing remains true: having a comprehensive wealth plan based upon a person's goals, values and best interests that they can stick to during times of instability is paramount. To help educate Northeast Ohio area residents on creating a retirement plan, Fidato Wealth, an independently owned and operated fiduciary financial advisory firm located in Middleburg Heights, announced an online continuing education course, scheduled to begin later this month.

The two-session interactive course, titled Retirement Planning Today®, will be held virtually on Tuesday, June 23 and Tuesday, June 30 from 6-8pm. Fidato Wealth founder and CEO, Tony D'Amico, CFP® will lead the two-part course, which is sponsored by Lorrain County Community College.

D'Amico, who has taught this course 60 times in a college classroom setting over the past 10 years, is excited for the challenge of teaching a virtual classroom. "Video conference meetings require extra preparation for the instructor, as attention spans on video conference appointments are shorter. With our added focus and preparation, we are able to make the course very effective."

"The class will have a digital text book, and the presentation has been made to fit a 2-hour session, for a total of two evenings. Since attendees will attend from the comfort and security of their homes, more energy can be directed to learning without the added commute. The digital format will allow attendees to easily follow along at their desktop computer, as they interact with the class and instructor, and have a source to which they can refer at a later time," added D'Amico. "Although this will be our first time teaching this material in an online course, we have conducted over a hundred video conference appointments in our work as financial advisors. As a result, we are experienced with adding the off-site component to our proven financial strategies course. We have worked through the challenges already, with clear instructions on what attendees need to do to test the video conference platform we are using, as well as how to optimize their connection."

"Retirement planning has taken on a much greater importance as life expectancies have increased, people are retiring earlier, and many view retirement as a new and fulfilling chapter to their life," D'Amico said. "During this course, attendees will learn how to define retirement goals and return from the class with practical information they can apply immediately in their personal lives. Although the class is geared towards a virtual experience, the curriculum has great real-life data to highlight the importance of retirement planning decisions."

The Retirement Planning Today® sessions blend retirement education with life planning to help participants build wealth, align their money with their values and achieve their retirement lifestyle goals. This class has been designed for those ages 50 to 70 who wish to educate themselves about planning for a successful retirement. Each year, the course is updated with current information and best practices in retirement planning.

This educational course covers the complete planning process including:

- Tax planning strategies
- Strategies to manage investment risks
- Estate planning
- How to invest in and take money out of a company retirement plan
- Retirement lifestyle planning, including how to determine the savings needed to retire today or in the future

View the Retirement Planning Today® brochure here.

"Education can help people make informed decisions about their finances, and take proactive steps to promote their financial well-being, and live the retirement they have envisioned," said D'Amico. "In straightforward language, I will explain time-tested retirement planning strategies. Whether their objective is to build a nest egg, protect their assets or preserve their lifestyle throughout retirement, this course will help them plan their future with confidence," added D'Amico.

"The number one thing for individuals to keep in mind in our current economy is to ignore the short-term event and volatility, as it relates to their financial planning. We understand these are very difficult times. Our goal is to be the voice of reason, providing calm and educational information to plan for the long haul," D'Amico concluded.

Class sizes are limited. Registration is $49 and includes a 235-page digital workbook. Spouses or guests may attend the online class at no additional charge.

To register for the course, register online through Lorain County Community College at lcccnoncredit.pdx.catalog.canvaslms.com/browse/clll/courses/cfll-retirement-planning-today-june-2020, or call 440-328-8382 with questions or for registration assistance.

ABOUT FIDATO WEALTH

Fidato Wealth is a financial advisory firm headquartered in Middleburg Heights, OH, that provides retirement planning, family wealth management, and business advisory services. As an SEC Registered Investment Advisor, the firm is legally bound to act as a fiduciary, which means that the clients' needs always come first. Tony D'Amico, CFP®, CEO and Senior Wealth Advisor, has been quoted in The Wall Street Journal, CNBC, Barron's and other national publications. Fidato Wealth was named to Financial Advisor magazine's Top RIA Ranking list in 2017, 2018 and 2019. For more information, visit www.fidatowealth.com.

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