**Program Planning Worksheet**

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| **Title of Program** | Tax Planning for Retirement |
| **Date(s) of Program** | 10/06/2022 |
| **Location(s) of Program** | Bearden Branch Library |
| **Lead Staff Person, job title** | Nicole Barajas, manager |
| **What is the purpose of this program?** How is it relevant to the Library’s mission, promote collections, support the community, promote lifelong learning? | Purpose: Teach strategies that could potentially reduce students’ tax burden in retirement.  This class promotes lifelong learning and supports the community. |
| **Program content and implementation.** What are you going to do and how are you going to do it? Who is the presenter, including staff, and what are the person’s credentials. | “If there were ways to protect your money with an effective tax strategy, wouldn’t you want to know? Failure to properly plan for taxes could be one of the biggest retirement mistakes you can make. Multiple relief packages, the CARES Act, our National Debt and Deficit spending are challenges  that could be reflected in your future tax bills. Through discussion on the history of taxes and how the events of the past few years could impact the future of your taxes, you’ll learn strategies that could potentially reduce your tax burden in retirement. Don’t let tax traps swallow your retirement savings whole. Topics in this class include:   * Tax Planning vs. Tax Preparation * How our historic tax system may affect our future * How to increase income, but not income taxes in retirement     About the Instructor  Jim Brogan, MBA, is a well-known financial educator, author, and talk-show host. His radio show, More Living with Jim Brogan, is NewsTalk 98.7’s number one listened to weekend program, and a leading resource for residents over 50.    Jim was named the 2011 National Advisor of the Year by Senior Market Advisor magazine. He is a highly sought-after instructor, and has trained hundreds of advisors across the country on the complex rules for IRA/401k distributions.    Jim holds his MBA from the University of Tennessee. He is a Certified Estate and Trust Specialist (CES), a Certified Retirement Financial Advisor (CRFA), and President/Founder of Brogan Financial, an SEC Registered Investment Advisory firm. Jim lives in Knoxville with his wife, Dee Dee, and two children.” |
| **Supplies needed.** Estimate cost if any. Where will funds come from? | None |
| **Equipment needed.**  If you don’t have needed equipment at your location, where is it coming from? Has it been reserved? How is it being delivered? | Laptop and projector. Reserved from IT. |
| **Title of book(s) being discussed** |  |