

***Retirement Personal
Development Webinar***
March 13, 2025

2:00 pm – 3:00 pm | Course W2501

Guide to Retirement

CPE Credits: 1.0 | CPE Type: Personal Development | Level: Basic | Prerequisites: None

Program Content: This presentation will cover the retirement landscape and the topics to consider when planning and building a sound retirement on your own terms including saving, spending, and investing for and in retirement.

Learning Objectives: After the session, participants will be able to

- Have a better understanding of the retirement landscape including a general overview of Social Security considerations.
- Understand the importance of saving for retirement including a general overview of the types of accounts that can be utilized and the tax implications of those accounts.
- Understand the importance that spending and investing has in and on retirement including the 4% Rule, the rising costs of healthcare and long-term care in retirement, and the impacts of attempting to time the market.



Amy L. Wren, J.D. holds a law degree from the William H. Bowen School of Law and is a strong finance professional with 25 years of experience in the trust and wealth management industry. Personal finance and helping others achieve their financial goals is her passion. Amy is currently a Director in the Private Client unit of Forvis Mazars LLP US, a top 10 accounting firm with a presence in 100+ combined countries and territories and 400+ combined offices.

EDUCATIONAL CREDITS



Healthcare Financial Management Association-Arkansas Chapter is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBAregistry.org.

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*Prerequisites and advance preparation are not required unless otherwise indicated.
A maximum of 1.0 CPE credits is available. All courses are instruction method GROUP LIVE.
All sessions will incorporate an element of participant engagement, and there will be time for questions after each session.*

CPE Type is classified based on NASBA definitions. The AR State Board of Public Accountancy requires license holders to complete a minimum number of hours in certain subject areas. The chapter has determined that the following CPE types fall within these subject areas: Accounting, Accounting (Governmental), Auditing, Auditing (Governmental), Regulatory Ethics, Behavioral Ethics & Taxes.

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Go to: www.arkansashfma.org

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***Registration Fee Arkansas HFMA members & AR Sponsors: \$0**

***Registration Fee Non-Arkansas HFMA members: \$25**

***Deadline for registration and payment is March 11, 2025**

REFUNDS AND CANCELLATIONS

If cancellations are received after March 11, 2025, the registration fee is not refundable. Registrants who do not cancel or fail to attend must pay the entire fee. Substitutions, however, are permitted. Registration forms and cancellations must be emailed to the address below. Phone and voicemail are not valid forms of communication for cancellations. For more information regarding administrative policies such as complaint and refund, please contact Tami Hill at 501-231-0200 or arhfma@arkansashfma.org.