



Northwest Illinois Criminal Justice Commission

Doug Coppotelli, Regional Director
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Mobile Team Unit #1 is funded in partnership with the Illinois Law Enforcement Training & Standards

Retirement Planning Today

DATE: August 10, 2022

Registration Ends: August 1, 2022

TIME: 9:00 AM—4:00 PM 6 Hours

TRAINING LOCATION: Dixon Police Dept., 220 S. Hennepin Avenue, Dixon IL

INSTRUCTOR: Regan Shipp, CPA Rosemeyer Management Group

Course Description:

Retirement Planning Today combines life planning & retirement planning concepts. Students will receive an easy-to-understand education on life planning and retirement planning strategies and a 200+ page textbook with examples and illustrations.

Here is a list of some of the takeaways from the training:

- What do you want your retirement to look like?
- Have you identified your retirement goals?
- Have you identified all your income sources in retirement?
- How much money do you spend per year?
- Do you track that amount for changes on an annual basis?
- Do you have a personal financial statement or a balance sheet?
- Have you projected where your taxable income will be in retirement?
- Have you reviewed your Social Security Statement for Accuracy?
- Have you determined the age you desire to begin collecting Social Security?
- Investments-How much risk is in your portfolio
- Do you compare your returns against a benchmark on an annual basis?
- Do you need life insurance today or are you self-insured?
- Do you have a will and/or a trust?
- Will your estate avoid probate?
- Plus, many more.

Instructor Bio

Regan Shipp is an Investment Advisor with Rosemeyer Management Group. In her role, she strives to provide clients with personalized comprehensive wealth management advice. By looking at the full picture, she integrates investment strategies, risk management strategies, tax planning, retirement planning and estate planning to design a plan that will lead her clients to both financial success and freedom for the duration of their life. Regan grew up on a farm in Illinois and currently resides in Morrison, Illinois with her husband, Payton, and their dog, Axel.



EXPERIENCE

- Investment Advisor Representative with Rosemeyer Management Group
- Former Research Analyst at Rosemeyer Management Group
- Former Tax and Accounting Intern at Compeer Financial

EDUCATION

- Certified Financial Planner (CFP®)
- Certified Public Accountant (CPA)
- Series 65 Licensed
- Life Insurance Licensed – Illinois & Wisconsin
- Bachelor of Science – Accounting, University of Wisconsin – Platteville, Summa Cum Laude
- Bachelor of Science – Agricultural Business, University of Wisconsin – Platteville, Summa Cum Laude

Partial funding provided by Illinois Law Enforcement Training and Standards Board and MTU#1's request for certification of this course has been approved by the Illinois Law Enforcement Training and Standards Board

REGISTRATION:

All registrations are received on the [MTU#1 website](#). Registration instructions [here](#)

This class meets the following mandate.

Officer Wellness and Mental Health 6 Hours