

## WBC 2-Day Training Working With Pre-Retirees



Jason Sanger



Art Sanger



Wade Pfau

### 2-Day Event

September 22 & 23

Dallas/Fort Worth Airport Marriott

#### Day 1:

WBC Principles & Philosophies of  
Working with Pre-Retirees

Dinner (provided) with  
guest speaker Wade Pfau

#### Day 2:

Pre-Retiree Cornerstones Blueprint™

Pre-Retiree Cornerstones Calculator™

Regular rate is \$1,499.

\$1,199 for first 25 registrants.

Hands-on casework. Feel free to  
bring your personal laptop.

Must be WBC licensed to attend.



Scan for registration  
information or visit  
[https://wbcornerstones.com/  
training/](https://wbcornerstones.com/training/)

### Day One: Pre-Retiree Presentations

- 9:00 am WBC Principles & Philosophy  
Academic Support for WBC  
Pre-Retiree Client Process
- 12:00 pm Lunch (provided)
- 1:00 pm Pre-Retiree Main Presentations
- Introduction Presentation
  - Wealth Building Presentation
  - Protection Presentation
- Supplemental Presentations  
Dynamic Future Value Calculator
- 4:00 pm Break
- 5:30 pm Dinner (provided) featuring Dr. Wade Pfau

### Day Two: Pre-Retiree Calculations

- 8:00 am Pre-Retiree Cornerstones Blueprint™  
Family Income Replacement Calculator (FIRC)  
Cornerstones Calculator™
- Basic Scenario Data Entry
  - Summary Report Templates
  - Live Interactive Scenario Building
- 12:00 pm Lunch (provided)
- 1:00 pm Cornerstones Calculator™ (cont'd)
- Existing Permanent Life Insurance Scenario
  - Cost of Waiting Scenario
- 3:00 pm Depart

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