



# *Short Course on Retirement Income Analytics*

*Thursday January 7, 2010 ( 9am to 2pm )*

*The Fields Institute for Research in Mathematical Sciences*

*Main Lecture Hall, 222 College Street, Toronto*

Join Professor Moshe A. Milevsky and staff at the The QWeMA Group for an opportunity to learn how to utilize "Retirement Income Analytics" in QVEL. This Excel-based course is intended for advanced financial advisors and retirement planning specialists. It will take place at the prestigious Fields Institute, a world-renowned mathematics research institute.

Registration fee is \$299. To register, please email us at [info@qwema.ca](mailto:info@qwema.ca) or call us at 416-849-0010.

LIMITED  
ENROLLMENT

*Moshe Milevsky, PhD.*  
*Tom Salisbury, PhD.*  
*Huaxiong Huang, PhD.*

*Amongst other things you will learn how to...*

- Quantify the *sustainability* of your clients' retirement income plans
- Use *Product Allocation* "theory" for securing lifetime retirement income
- Measure the sensitivity of client portfolios to *extreme market* events
- Report your clients' expected *financial legacy* in numerical terms
- Calculate the *optimal* retirement "Product & Asset Allocation"