Training Course on Small Business Retirement Solutions

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Small Business Retirement Solutions is designed to provide business owners, HR professionals, and financial advisors with the knowledge and tools necessary to implement effective retirement plans for small businesses. As small businesses face unique challenges in attracting and retaining talent, offering a robust retirement solution can significantly enhance their competitive advantage and support employee financial well-being. This course will explore various retirement plan options tailored to small businesses, including SIMPLE IRAs, SEP IRAs, and 401(k) plans. Participants will learn about the regulatory landscape, funding strategies, and best practices for plan administration. Emphasizing the importance of financial literacy, the course will also cover effective communication strategies to help employees understand and engage with their retirement benefits. Through a combination of theoretical insights, real-world case studies, and practical applications, attendees will engage in interactive discussions and hands-on exercises. By the end of the course, participants will have a comprehensive understanding of how to design, implement, and manage retirement solutions that meet the needs of small businesses and their employees.

Programme Curriculum

Training Course on Small Business Retirement Solutions

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Course Objectives

1. Understand the importance of retirement solutions for small businesses.
2. Analyze different retirement plan options available for small businesses.
3. Evaluate the regulatory requirements governing small business retirement plans.
4. Explore best practices for plan design and administration.
5. Discuss strategies for funding and contributing to retirement plans.
6. Develop skills in effective communication with employees about retirement benefits.
7. Assess the impact of retirement plans on employee retention and satisfaction.
8. Identify tools for measuring the effectiveness of retirement solutions.
9. Create actionable strategies for implementing retirement plans.
10. Stay informed about emerging trends in small business retirement solutions.
11. Foster a culture of financial wellness within small businesses.
12. Enhance client relationships through effective retirement planning.
13. Promote long-term financial security for employees.

Target Audience

1. Small business owners
2. HR professionals in small organizations
3. Financial advisors and planners
4. Compliance officers
5. Payroll and benefits administrators
6. Accountants and tax professionals
7. Nonprofit organization managers
8. Policy makers in small business finance

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Small Business Retirement Solutions

- Define the significance of retirement solutions for small businesses.
- Explore the benefits of offering retirement plans to employees.
- Discuss the impact of retirement solutions on talent acquisition and retention.
- Identify key terms related to small business retirement plans.
- Review case studies of successful retirement solutions in small businesses.

Module 2: Overview of Retirement Plan Options

- Analyze different types of retirement plans available for small businesses (SIMPLE IRAs, SEP IRAs, 401(k) plans).
- Discuss the eligibility requirements and contribution limits for each plan type.
- Explore the advantages and disadvantages of various retirement options.
- Identify criteria for selecting the appropriate plan for a small business.
- Review real-world examples of small businesses implementing different plans.

Module 3: Regulatory Requirements and Compliance

- Discuss the legal and regulatory frameworks governing small business retirement plans.
- Explore compliance obligations under ERISA and the IRS.
- Identify reporting and disclosure requirements for retirement plans.
- Review the implications of non-compliance and penalties.
- Analyze case studies of compliance challenges faced by small businesses.

Module 4: Plan Design and Administration Best Practices

- Discuss the key components of effective retirement plan design.
- Explore strategies for plan administration and recordkeeping.
- Identify best practices for managing contributions and distributions.
- Review tools and resources for efficient plan administration.
- Analyze case studies of organizations with effective plan management.

Module 5: Funding and Contributions

- Explore funding strategies for small business retirement plans.
- Discuss employer matching contributions and employee deferrals.
- Identify options for plan financing and tax considerations.
- Review best practices for funding sustainability.
- Analyze examples of funding strategies in successful small businesses.

Module 6: Communication Strategies for Employee Engagement

- Discuss the importance of effective communication about retirement benefits.
- Explore techniques for educating employees on retirement plans.
- Identify tools for delivering information and resources to employees.
- Review best practices for ongoing communication and support.
- Analyze case studies of successful employee engagement initiatives.

Module 7: Measuring Effectiveness of Retirement Solutions

- Discuss metrics for evaluating the success of retirement plans.
- Identify key performance indicators (KPIs) relevant to small business retirement solutions.
- Explore methods for assessing employee participation and satisfaction.
- Review tools for monitoring and reporting on retirement plan performance.
- Analyze case studies of organizations measuring effectiveness.

Module 8: Future Trends in Small Business Retirement Solutions

- Overview of emerging trends impacting small business retirement plans.
- Discuss innovations in technology and their implications for retirement solutions.
- Explore the potential of automatic enrollment and escalation features.

- Identify challenges and opportunities presented by changing regulations.
- Review case studies of organizations adapting to future trends.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

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