

PRESS RELEASE or FOR IMMEDIATE RELEASE

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### **Introducing SouthPark Capital's Chartered Retirement Planning Counselor**

South Park's Jon Hogan has successfully completed his Chartered Retirement Planning Counselor designation (CRPC), making him an even more valuable member of our team. This program focuses on assessing an individual's needs before and after retirement, including sources of retirement income, savings, taxes, and estate plan.

"Financial advisors have the responsibility to stay current and up to date with the ever changing and evolving Financial Industry, this is why I decided to continue my education through Kaplan Financial and obtain the Chartered Retirement Planning Counselor designation (CRPC)," says Jon.

The CRPC designation enables experienced advisors who are focused on retirement planning for individuals define a "road map to retirement." There is a focus on clients' pre- and post-retirement needs, as well as issues related to asset management and estate planning. "I've been searching for a program that really specializes in the pre and post retirement needs of the type of client we tend to attract at SouthPark Capital. I wanted to learn more about ways to address all areas in retirement planning, especially those that address estate planning concerns, asset management techniques, along with solving longevity risks with alternative types of income sources for retirees. The Chartered Planning Counselor (CRPC) designation does just that," says Jon.

As people near and enter retirement, their financial planning needs can change, sometimes dramatically. At this time in life, they may look to invest differently, as well as nail down an estate plan. Additionally, the retirement landscape and policies are changing. "I have a passion for helping individuals make smarter financial decisions, and by staying up to date with the latest programs and arming myself with more knowledge, feel very confident that I am giving my clients the best support they can get," says Jon who looks forward to continuing to work with clients on building collaborative plans to achieve their desired outcomes.

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