My Wharton Experience

Chirag Chauhan has earned a Certificate in Retirement Planning from The Wharton School of the University of Pennsylvania and has been awarded Equitable Advisors' ***Retirement Planning Specialist*** title for completing the Equitable At Retirement® education program. Only a select group of financial professionals nationwide complete this elite program.

The Wharton School is recognized around the world for its academic excellence at every level of business education.

The certificate curriculum was developed for financial professionals to provide a higher level of preparation and knowledge to best serve the retirement planning needs of their valued clients. This weeklong course included 50 hours of intensive study taught by 10 Wharton School faculty members. Topics covered included:

- Identifying, Mitigating and Insuring Retirement Risks
- Qualified and Non-Qualified Plans and their Roles in Retirement Planning
- Medicare and Social Security - Dealing with Institutional Risk
- Asset Allocation and Diversification
- Estate Planning and Tax Issues in Retirement

The Wharton program is part of Equitable' s overall commitment to providing clients with the most comprehensive and up-to-date guidance on a broad range of financial topics related to retirement. After completion of the initial program, participants are also invited to attend an annual At Retirement® forum featuring Wharton faculty and industry experts to further continue their retirement education. Equitable chose Wharton because of its leadership in management research, education and knowledge creation.

Focusing on specific concepts and issues that are most important to the At Retirement® generation, Equitable Advisors and The Wharton School developed this comprehensive program. Selected on the basis of their value-based approach to relationship management, participants worked to strengthen their retirement risk-management and financial asset allocation knowledge and methodology.

Chirag Chauhan works with individuals and business owners to help them define their retirement goals and formulate strategies to help meet their unique needs and objectives.

Offers business insights, information and research. Click here to view and/or to subscribe to the on-line newsletter.

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