



WHAT WILL IT TAKE TO REALIZE YOUR DREAMS?

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Having a healthy, happy family is a goal we all strive for. Keeping your family well from a financial standpoint also requires continuous effort and knowledge of appropriate priorities, like managing cash flow, college funding, adequate insurance coverage and accumulation of assets. Preparing for retirement should also be a top concern.

However, you also have your dreams, don't you? Dreams are good. Nevertheless, it takes more than dreams if they are to become realities. You must build a foundation for investing success, and it takes preparation. Your financial future depends on actions you take now.

I WOULD LIKE TO KNOW MORE... **ABOUT THE TOPICS I'VE CHECKED BELOW:**

- | | |
|---|--|
| <input type="checkbox"/> College savings techniques | <input type="checkbox"/> Tax reduction tools |
| <input type="checkbox"/> Understanding personal investments | <input type="checkbox"/> Long-term care funding strategies |
| <input type="checkbox"/> Leaving your employer? | <input type="checkbox"/> Asset utilization strategies for retirement |
| <input type="checkbox"/> Planning your trip through retirement | <input type="checkbox"/> Risk management |
| <input type="checkbox"/> Managing money in retirement | <input type="checkbox"/> Estate planning principles |
| <input type="checkbox"/> Women and investing | <input type="checkbox"/> Asset allocation: Developing your investment policy |
| <input type="checkbox"/> IRAs | |
| <input type="checkbox"/> Maximizing your employee benefits and qualified plan | |

PLEASE LIST THE NAMES OF 5 CLIENTS THAT COULD BENEFIT FROM THIS PROGRAM:

Name

Phone #

1) _____

2) _____

3) _____

4) _____

5) _____
