



Do You Have a Tailored Financial Plan in Place?



Please join us for an informative event.

Everyone can benefit from a financial plan that is tailored to individual needs and circumstances. A financial roadmap can motivate you to save money, help you meet your financial goals, and improve your overall financial security now and in the future.

In this seminar on Financial Planning Basics, you'll learn:

- How to construct a budget and the importance of establishing an emergency fund
- Credit fundamentals
- Basic investment concepts, including risk tolerance and the difference between pre-tax, after-tax, and tax-deferred investments
- Basic estate planning concepts

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.

When & Where

Event Location:
123 Main Street or Zoom link
Wednesday, March 3, 2021

R.S.V.P.

To reserve your spot, please contact me at:
Registered Rep Phone
[Registered Rep email address](#)



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