



# 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  
10:40 AM to 12:40 PM

### R.S.V.P.

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



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