

Are Your Investments on Track?



Please join us for an informative event.

The best investing strategy is a carefully planned and prepared approach to managing and accumulating money. A well-planned strategy can help you meet your short-term, mid-term, and long-term financial goals. Investment planning requires discipline and patience. But it doesn't have to be difficult.

It is not necessary to do extraordinary things to get extraordinary results -- Warren Buffet

In this seminar on Investment Planning, you'll learn:

- Investment fundamentals, including the effects of inflation and compounding
- How to identify financial goals and time horizons
- How to measure your risk tolerance, and the relationship between risk and return
- The difference between cash equivalents, bonds, stocks and mutual funds, and the importance of asset allocation

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](#)



Jack Smith

Wealth Advisor

1234 Medical Drive
Pottstown, PA 19464
0] 555.555.5555

jack.smith@lpl.com
www.lplatcu.com

 **LPL Financial**

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker/dealer (member FINRA/SIPC).