

COMPANY
LOGO

If you would rather discuss your questions about Wills, Trusts and estate planning in a private setting, you can schedule a free consultation with John Smith in the comfort and privacy of our office. Please call 123-123-1234 to schedule a time to meet or visit www.companywebsite.com.

John Smith is a financial advisor at Smith Financial Group and an investment advisor representative of Great Lakes Retirement, Inc. Smith Financial Group has helped hundreds of Massachusetts retirees and pre-retirees while emphasizing the protection of assets from stock market loss, minimizing excessive investment fees, and creating income during retirement that you cannot outlive.

YOUR SPEAKER: JOHN SMITH

Please Join Us
FOR AN ESTATE PLANNING DINNER EVENT
AT RUTH'S CHRIS STEAK HOUSE



SAVE THE DATE

Special Invitation

OPPORTUNITIES & OBSTACLES WITH WILLS, TRUSTS & ESTATE PLANNING

In uncertain times, it's more important than ever to protect your estate by avoiding common and expensive mistakes. This lively, free seminar will cover planning for your family's future, reducing risk, and minimizing estate taxes.

After the presentation, you and your spouse are cordially invited to join us for a complimentary gourmet dinner, elegantly served at Ruth's Chris Steak House. Our informative and entertaining events are by invitation only. Our events are always well-attended and seating is limited. Please reserve your seat today by calling the 24 hour reservation number at 800-000-0000!

We will discuss:

- The goals of an estate plan.
- Common mistakes made by individuals (and even attorneys) in estate planning, and how to avoid them.
- Potential issues with probate court, including steep expenses and public disclosure of your financial affairs.
- State and federal estate-tax laws and how they might affect your estate.
- Protecting your loved ones and your legacy by minimizing or eliminating estate taxes.
- How you can protect the assets your heirs inherit from lawsuits, divorce, and other claims.

TUESDAY

December 10th
6:00 PM

OR

THURSDAY

December 12th
6:00 PM



123 Main Street | Anytown, ST 12345

Doors open at 5:30 PM

MENU

Option 1

Option 1 Description

or

Option 2

Option 2 Description

Doors close promptly at 6:00 pm. Please no advisors. First time attendees only.



SEATING IS LIMITED, REGISTER NOW!

CALL **800-000-0000** NOW TO RSVP

Or Register Online at: www.myfinancialseminar.com/lastname