

PLEASE CALL [OFFICE PHONE #] TO SCHEDULE A TIME TO MEET.

These exclusive appointments are very popular and the calendar fills up quickly.

If you would rather discuss your retirement questions in a private setting, you can schedule a free consultation with John Smith in the comfort and privacy of our office.

WOULD YOU PREFER A FACE-TO-FACE MEETING?

John Smith
President & Founder of
Smith & Smith Investments



JANUARY
12TH OR 14TH

5:30PM

VENUE LOGO

12345 MAIN STREET
ANYTOWN, ST 12345

YOU ARE CORDIALLY INVITED
TO AN EVENING OF EDUCATIONAL
DISCUSSION AND COMPLIMENTARY DINING



REGISTRATION IS LIMITED! CONFIRM TODAY AT
800-123-4567 OR VISIT WWW.MYFINANCIALSEMINAR.COM/AGENTNAME

IF THERE WERE SIGNIFICANT MISSING FACTS COSTING YOU MONEY *WHEN WOULD YOU WANT TO FIND OUT?*

Join other proactive, successful retirees who have learned how this seminar is a call to action to educate themselves and improve their future.

YOU WILL LEARN:

- The **3 biggest misconceptions** your CPA, attorney and financial advisor may be missing that could be **costing you thousands per year!**
- How you can **legally reduce or eliminate** Social Security taxes, IRA taxation and income taxes.
- **Critical time and money saving steps** you need to take before selling any real estate, business or investments.
- The **two most important questions you must ask** right now **if you own bonds or bond funds.**
- The **misconceptions** surrounding the choice between buy and hold versus timing the market.
- **Three important things your trust or will does not cover** that could cost your heirs dearly.

GET INFORMED AND TAKE
CONTROL OF YOUR RETIREMENT TODAY!
CALL 800-123-4567

JANUARY

12TH OR 14TH

5:30PM

VENUE LOGO

12345 MAIN STREET
ANYTOWN, ST 12345



CALL 800-123-4567 OR VISIT
WWW.MYFINANCIALSEMINAR.COM/AGENTNAME

ABOUT YOUR PRESENTER



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. Smith Financial Group hosts a popular radio show, Finance Matters, which airs on AM 730 WKLD and AM 1230 WLPM. Interviewed each week on the show are the nation's top industry experts on retirement planning strategies. John has been helping individuals with their retirement needs and concerns since 2001.



Smith & Smith

Investments/Wealth Management