

[John and Jane Doe]

DON'T RISK YOUR RETIREMENT: 7 FINANCIAL ROADBLOCKS TO ADDRESS NOW

Retirement obstacles can be easier to avoid when you know what lies ahead.

You and a guest are cordially invited to join us for a COMPLIMENTARY, no-obligation dinner event where you will learn strategies designed to help avoid financial roadblocks in retirement. Our events are by invitation only and seating is limited, so please call TODAY to reserve your seat.

Join Us and Discover

RETIREMENT ROADBLOCKS: 7 Financial Risks to Avoid

1. Are you confident that your savings will withstand a **25 to 30+ year retirement**?
2. Do you have a plan to combat **inflation's damaging effects** on your purchasing power?
3. Is your **retirement income** completely dependent on market performance?
4. Do you know how much you can **withdraw from your retirement savings** each year without running out of money?
5. Are you confident that your **Social Security benefits** are optimized for yourself and your spouse?
6. Do you have strategies to cover rising healthcare costs and potential **long-term care needs**?
7. Do you have a **tax allocation strategy** to help minimize the impact of taxes during retirement?

While the road to financial freedom in retirement may have its twists and turns, an experienced financial professional can help straighten the path.

[Restaurant Logo]
[Restaurant Address]

Your Host:
[Name, Title | Company Name]

Dinner

[DAY, MONTH DATE]
At time am/pm

OR

Dinner

[DAY, MONTH DATE]
At time am/pm

SEATING IS LIMITED - GUARANTEE YOUR SEAT:

Call 24/7 ###-###-####

OR Register online at yourRSVP.com and enter code: XXXX.

Please note that the host of this event can provide information but not give tax, legal, or Social Security advice. You are encouraged to consult your tax advisor, attorney, or the Social Security Administration.

Not approved by, endorsed by, or affiliated with the U.S. Government or any governmental agency.

Insurance presentation - Insurance products may be offered at some later date.

Guarantees offered on insurance products are backed by the financial strength and claims-paying ability of the issuing insurance company.

[BD/RIA disclosure, if applicable]

[RESTAURANT LOGO]

[John Doe]

YOU ARE CORDIALLY INVITED



Please Join Us for Dinner at
[Restaurant Name]

[Address]

[BD/RIA disclosure, if applicable]

[Compliance reviewed producer biographical information]

[Title (insurance agent, if required), Company Name]

[PRODUCER NAME]

[Producer
Photo]