



LUNCH & LEARN

How to create **FLEXIBILITY IN RETIREMENT**

What if your clients could leverage an asset whose growth is not directly related to the equity markets and whose profits can be accessed tax-free? Such an asset could provide the tax diversification missing in some clients' portfolios. Over lunch, we'll discuss how tax diversification can directly lead to flexibility in retirement. We'll share how our team can assist you in every stage of planning -- from identifying the right client, to executing a completed plan.

DATE/TIME

Presented by: [NAMES OF PRESENTERS]

RSVP CONTACT INFO/SIGN-UP FORM

