YOU'RE INVITED

A Tax Bill or a Legacy

LIFE INSURANCE SALES PRESENTATION

For use in CA, IL & TX must use LIFE INSURANCE SALES PRESENTATION

JOIN US!

DATE:

March 9th, 2017

TIME:

6-7pm

HOSTED BY:

Jared Allen, Edward Jones

Jason Rizzo, Prudential DLC

Dinner to be served
Guests are welcome

WHERE:

Silks Restaurant
320 Blenheim Lane
Havre de Grace, MD 21078

PLEASE RSVP BY:

Ashley Detar by March 7th, 2017

PHONE:

410-939-1621

EMAIL:

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Retirement distribution planning needs to be an important part of everyone's retirement plans.

Please join me for an informational session on the basics of retirement distribution planning.

This session will feature a discussion on:

- The importance of naming a beneficiary(ies)
- Stretching an IRA over your children's and/or grandchildren's lives
- When you should consider a strategy using a trust
- Converting an IRA at the death of the participant and using life insurance to help provide liquidity for the income taxes
- Converting an IRA today if other, sufficient assets are available
- The value of life insurance in retirement planning

Attending this seminar is free, but reservations are required, as seating is limited.

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