



**DO YOU HAVE FRIENDS AND FAMILY
READY FOR RETIREMENT?
DON'T KEEP US A SECRET!**

Do you have friends, colleagues, neighbors, or family members who are retired or retiring soon? Let us help them get their affairs in order. Having them attend one of our seminars is the best place to start.

Clients who refer friends, colleagues, neighbors, or family members to this event will qualify to attend our popular annual Summer BBQ.

We pride ourselves on offering a one stop shop and being able to assist our clients with anything from retirement plan conversions to estate planning documents.

This seminar is based on Ed Slott's book "Retirement Decisions Guide, 125 Ways to Save and Stretch Your Wealth." Attendees will receive a complimentary copy of this book during the seminar. Ed Slott is called "The Best" source for IRA advice by The Wallstreet Journal.

**Monday, 4/17/2023 - 6:00 pm
Golden Corral Buffet and Grill
Kannapolis, NC**

**Tuesday, 4/18/2023 - 6:00 pm
La Cava Restaurant
Salisbury, NC**

**Monday, 4/24/2023 - 6:00 pm
Five Points Public House
Albemarle, NC**