

Marketing Materials

Each seminar includes a coordinated marketing campaign that contains the following components:



Flyer



Invite



2 Page Letter



Postcard

Scroll this document to see all marketing campaign components.

What provisions in the new tax law could affect you and your family?



The Tax Cuts and Jobs Act started taking effect in 2018. This \$1.5 trillion tax-reduction package has fundamentally changed the individual and business tax landscape.

Some of the tax changes are permanent, while others expire after 2025. Whether you will pay more or less in income taxes depends on a variety of factors unique to your situation. So the more you know about the tax law provisions, the better prepared you will be.

Are you going to get your share of taxpayer savings?

Join us for an educational presentation where we'll focus on:

- **Changes to marginal income tax brackets and the alternative minimum tax**
- **Limits on common itemized deductions, such as mortgage interest and state and local taxes**
- **Increases in standard deduction amounts**
- **Elimination of personal exemptions**
- **Child tax credit rules**
- **529 savings plan enhancements**
- **Federal estate and gift tax provisions**
- **Some provisions affecting business owners**

When you attend the seminar, you will receive a 20-page, information-packed workbook with essential information from the presentation. Perhaps best of all, you'll be eligible for the complimentary consultation offered to all seminar participants.

Tax Cuts and Jobs Act *How Will You Be Affected?*

sponsored by

(YOUR COMPANY'S NAME)

(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

will be held on

(DAY, DATE)

from (TIME) to (TIME)

at (LOCATION).

Reserve your seat and your full-color workbook today!

Call (YOUR PHONE NUMBER).

Before investing in a 529 savings plan, please consider the investment objectives, risks, charges, and expenses carefully. The official disclosure statements and applicable prospectuses — which contain this and other information about the investment options, underlying investments, and investment company — can be obtained by contacting your financial professional. You should read these materials carefully before investing.

(place any necessary disclosure here)

Before investing in a 529 savings plan, please consider the investment objectives, risks, charges, and expenses carefully. The official disclosure statements and applicable prospectuses — which contain this and other information about the investment options, underlying investments, and investment company — can be obtained by contacting your financial professional. You should read these materials carefully before investing.

Preview

Tax Cuts and Jobs Act

What is in the new tax law that affects you?



The Tax Cuts and Jobs Act took effect in 2018.
This \$1.5 trillion tax-reduction package fundamentally
changed the individual and business tax landscape.

Whether you will pay more or less in
income taxes depends on a variety of factors.
So the more you know about the tax law changes,
the better prepared you will be.

Join us for an educational presentation where
we'll examine major provisions in the tax law
that could affect you and your family.

Preview

Tax Cuts and Jobs Act *How Will You Be Affected?*

will be held on

(DAY, DATE)
(TIME) to (TIME)
(LOCATION)

To reserve your place, call

(PHONE NUMBER)
by (DATE).

(YOUR FIRM'S NAME)

(YOUR COMPANY'S NAME OR LOGO)
(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

Tax Cuts and Jobs Act

How Will You Be Affected?

(DATE)

(NAME)
(STREET ADDRESS)
(CITY, STATE, ZIP)

Dear (NAME):

The Tax Cuts and Jobs Act, which was signed into law at the end of 2017, started taking effect in 2018. This \$1.5 trillion tax-reduction package has fundamentally changed the individual and business tax landscape.

Some of the tax provisions are permanent, such as those related to businesses. Others — especially those affecting individual taxpayers — expire after 2025 unless they are extended by Congress in the future.

Whether you will pay more or less in income taxes depends on a variety of factors unique to your situation. So the more you know about the tax law provisions, the better prepared you will be.

Are you going to get your share of taxpayer savings?

It's important to have a good understanding of:

- **Changes to marginal income tax brackets and the alternative minimum tax**
- **Limits on common itemized deductions, such as home mortgage interest and state and local taxes**
- **Increases in standard deduction amounts**
- **Elimination of personal exemptions**
- **Child tax credit rules**
- **529 savings plan enhancements**
- **Federal estate and gift tax provisions**
- **Additional provisions affecting business owners**

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Please join us for our **Tax Cuts and Jobs Act** seminar on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). This educational presentation is sponsored by (YOUR FIRM'S NAME). When you attend, you will receive a 20-page, information-packed workbook that is filled with important information you will want to remember from the presentation.

The seminar is enhanced with colorful graphics highlighting the latest facts and figures, and you'll find it to be a brief and easy-to-understand presentation.

Perhaps best of all, to help you make the most of your seminar experience, I'll be offering a complimentary consultation to everyone who attends. This follow-up meeting is a great way to discuss questions you may have after the presentation and to evaluate other financial concerns you may have.

I hope you can take advantage of this excellent educational opportunity. You are welcome to bring a friend to the seminar. Seating is limited, however, so call (YOUR PHONE NUMBER) today to reserve your place and your workbook.

Sincerely,

(YOUR NAME)
(YOUR TITLE)

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Tax Cuts and Jobs Act

*What's in the new tax law
that affects you and your family?*

Preview

A hand holding a small American flag on a white pole. The flag is positioned in the center-right of the frame. The background is a blurred crowd of people, suggesting a public event or rally. The overall scene is brightly lit, possibly outdoors during the day.

Tax law provisions implemented by the Tax Cuts and Jobs Act have already started taking effect. Some are permanent changes, and others expire after 2025.

Did you know that there are new limits on deducting mortgage interest, state and local taxes, casualty and theft losses, and medical expenses? Whether you will pay more or less in income taxes will depend on a variety of factors unique to your situation.

Join us for an educational presentation where we'll examine major provisions in the tax law that could affect you and your family.

Tax Cuts and Jobs Act: *How Will You Be Affected?*

(DAY, DATE)

(TIME)

(LOCATION)

Call (PHONE NUMBER) to register.

Before investing in a 529 savings plan, please consider the investment objectives, risks, charges, and expenses carefully. The official disclosure statements and applicable prospectuses — which contain this and other information about the investment options, underlying investments, and investment company — can be obtained by contacting your financial professional. You should read these materials carefully before investing.