

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.

Your College Savings Goals Are Within Reach



One financial goal that most parents share is a college education for their children. With college costs increasing at a faster rate than general inflation, saving for college can be a daunting task. You can, however, pursue this important financial goal by establishing a college fund and taking action today.

Join us for a special educational workshop where we will explore:

- **Current and future college costs**
- **Sources of college funds**
- **Financial aid, scholarships, and loans**
- **529 plans and Coverdell Education Savings Accounts**
- **Investment options for college savings**

When you attend the workshop, you will receive a full-color, 20-page workbook on college funding. This resource contains essential information, exercises, and questions that are designed to help you make sound decisions about saving for a college education. Perhaps best of all, you'll be eligible for a complimentary consultation.

College Funding

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).

Please consider the investment objectives, risks, charges, and expenses of mutual funds and 529 savings plans carefully before investing. 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 from your financial professional. You should read these materials carefully before investing.

(Place any necessary disclosure here)

Please consider the investment objectives, risks, charges, and expenses of mutual funds and 529 savings plans carefully before investing. 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 from your financial professional. You should read these materials carefully before investing.

Preview

**Your College
Savings
Goals Are
Within Reach**



With the cost of college rising at a faster rate than general inflation, saving for a child's college education can be overwhelming.

Developing a funding strategy now can help ensure that you will be financially prepared when your child is ready for college.

You are invited to attend an educational workshop where we'll explore sound strategies for keeping a college education within reach.

Preview

College Funding

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)
(YOUR COMPANY'S ADDRESS)

Your College Savings Goals Are Within Reach

(DATE)

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

Dear (NAME):

One financial goal that most parents share is a college education for their children. Yet with college costs increasing at a faster rate than general inflation, saving for college can be a daunting task.

You can, however, pursue this important financial goal by establishing a college fund and taking action today. Starting now, rather than later, can help ensure that you are financially prepared when your child is ready for college.

Don't be unprepared.

- **Tuition and fees at public four-year colleges have more than tripled over the past 30 years.¹**
- **About 20% of parents who plan to help their children with college expenses haven't started saving yet.²**

Sources: 1) College Board, 2016; 2) Sallie Mae, 2016

Fortunately, there are steps you can take today to help improve your chances of funding college for your children. I am presenting a special workshop, *College Funding*, on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). This educational presentation is sponsored by (YOUR FIRM'S NAME).

At this workshop, you'll receive a full-color, 20-page workbook on college funding. This resource features information, exercises, and questions designed to help you make sound financial decisions. The workbook was prepared especially for my *College Funding* workshop, and it contains important information you'll want to remember from the presentation.

Continued on back

The workshop 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 filled with sound financial strategies you can use to accomplish your college savings goals.

In just over an hour, we will explore:

- **Current and future college costs**
- **Sources of college funds**
- **Financial aid, scholarships, and loans**
- **529 plans and Coverdell Education Savings Accounts**
- **Investment options for college savings**

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

I hope you will take advantage of this excellent opportunity. You are welcome to bring a guest to the workshop. 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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**Your College
Savings
Goals Are
Within Reach**



Saving for college can be a daunting task. College costs are escalating, and you could find yourself financially unprepared when your child is ready to attend college. Join us for an educational workshop where we'll explore sound strategies that can help you save and invest for your child's higher education.

College Funding

(DAY, DATE)

(TIME)

(LOCATION)

Call (YOUR COMPANY'S NAME)
at (PHONE NUMBER) to register.

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