

# Marketing Materials

Each seminar includes a coordinated marketing campaign that contains the following components, plus a sample view of the marketing manual for this system:



Flyer



Invite



1 Page Letter



Postcard

Scroll this document to see all marketing campaign components.

# How Health Can Affect Your Wealth in Retirement



Health care is a major expense for retirees. This timely seminar can help you estimate how much you might need for health-related costs in retirement and then develop a plan to help pay for them.

## Important Topics Covered

- Rising costs of health care in retirement
- How much *you* may need based on your age and other criteria
- Five factors that can affect overall costs
- Primary resources available, including Medicare and Medicaid
- Steps to help manage your out-of-pocket costs
- How to take advantage of health savings accounts

Everyone who attends will receive a full-color, 20-page workbook that summarizes the material covered and provides additional resources. Perhaps best of all, you will have the opportunity to meet with the instructor for a complimentary consultation. This is your chance to ask specific questions about your personal situation and explore strategies that you can implement right away to help improve your financial outlook. There is no obligation to attend this meeting.

## How Health Can Affect Your Wealth in Retirement

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 ).

(place any necessary disclosure and bio here)

# Preview

## How Health Can Affect Your Wealth in Retirement



One of the largest expenses you may face in retirement is the rising cost of health care. This timely seminar can help you estimate how much you might need for health-related costs and how to develop a plan to help pay for them.

During the seminar, we will review five factors that can affect overall health-care costs, how much *you* might need, the primary resources available (including Medicare), and steps you can take to help manage your out-of-pocket costs.

# Preview

## **How Health Can Affect Your Wealth in Retirement**

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 )

## How Health Can Affect Your Wealth in Retirement

( DATE )

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

Dear ( NAME ):

As you approach retirement, it's important to examine one of the largest expenses you may face — rising health-related costs —and develop a plan to help pay for them.

Please join me for a timely seminar on *How Health Can Affect Your Wealth in Retirement*, which will be conducted on ( DAY, DATE ) from ( TIME ) to ( TIME ) at ( LOCATION ). This educational presentation is sponsored by ( YOUR FIRM'S NAME ).

### In about an hour, we will cover:

- **Rising costs of health care in retirement**
- **How much you may need based on your age and other criteria**
- **Five factors that can affect overall costs**
- **Primary resources available, including Medicare and Medicaid**
- **Steps to help manage your out-of-pocket costs**
- **How to take advantage of health savings accounts**

Everyone who attends the seminar will receive a full-color, 20-page workbook that summarizes the material covered and provides additional resources.

Perhaps best of all, I'll be offering a complimentary consultation to everyone who attends. This meeting is a great way to discuss your personal situation and explore strategies that you can implement right away to help improve your financial outlook.

I hope you will take advantage of this excellent opportunity. Seating is limited, however, so please call ( YOUR PHONE NUMBER ) today to reserve your place and your workbook.

Sincerely,

( YOUR NAME )  
( YOUR TITLE )

# How Health Can Affect Your Wealth in Retirement

Preview



One of the largest expenses you may face in retirement is the rising cost of health care.

Join us for an educational seminar that addresses how much *you* may need based on your age and other criteria, five factors that can affect your overall costs, the primary resources available (including Medicare and Medicaid), steps you can take to help manage your out-of-pocket costs, and additional resources that may be available to you.

**How Health Can Affect  
Your Wealth in Retirement**

( DAY, DATE )

( TIME )

( LOCATION )

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

(place any necessary disclosure here)