

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.

Helping Your Money Last in Retirement



You've spent a lifetime accumulating money for your retirement. You've saved, invested, and taken advantage of workplace retirement plans. Now you have to make decisions about how to generate a steady income stream, and these decisions could have lasting repercussions.

Join us for an educational workshop where we'll focus on strategies designed to help you:

- **Make the most of your retirement income streams**
- **Tap into your retirement accumulations**
- **Understand retirement plan distribution rules**
- **Invest for stability, income, and growth potential**
- **Utilize financial vehicles that could last a lifetime**
- **Protect your income and assets from the unexpected**
- **Prepare for a more comfortable and rewarding retirement lifestyle**

When you attend the workshop, you will receive a 20-page workbook on retirement income strategies. This full-color resource contains essential information, exercises, and questions that will help you assess your current situation and make sound financial decisions. Perhaps best of all, you'll be eligible for the complimentary consultation offered to all workshop participants.

Retirement Income

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)

Mutual funds and variable annuities are sold by prospectus. Please consider the investment objectives, risks, charges, and expenses carefully before investing. The prospectus, which contains this and other information about the mutual fund or the variable annuity contract and the underlying investment options, can be obtained from your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

(place any necessary disclosure here)

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Preview

Helping Your Money Last in Retirement



You've spent a lifetime accumulating money for your retirement. You've saved, invested, and taken advantage of workplace retirement plans. Now you have to make important decisions about how to generate a steady income stream and not outlive your funds, and these decisions could have lasting repercussions.

You are invited to attend an educational workshop where we'll focus on strategies that are designed to help you improve your financial situation.

Preview

Retirement Income Strategies

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)

Helping Your Money Last in Retirement

(DATE)

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

Dear (NAME):

You've spent a lifetime accumulating money for your retirement. You've saved, invested, and taken advantage of workplace retirement plans. Now you have to make decisions about how to generate a steady income stream, and these decisions could have lasting repercussions.

Will your hard-earned money last a lifetime?

Which assets should you spend first?

What withdrawal decisions will work best?

What investment alternatives can produce income?

Where do you start?

The rules are different when you retire. You may need to adjust your asset allocation and consider different investment choices. You will need to make decisions on the best methods to withdraw funds from your savings, investments, and retirement plans. And you will want to help protect your income and assets from unforeseen events.

Fortunately, there are sound ways to help stretch your retirement income. That's why I am presenting a special *Retirement Income* workshop on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). This educational presentation is sponsored by (YOUR FIRM'S NAME).

At this workshop, you will receive a 20-page workbook on retirement income strategies. This full-color resource features information, exercises, and questions designed to help you make sound financial decisions. The workbook was prepared especially for my *Retirement Income* workshop, and it contains important information you will want to remember from the presentation.

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. In only about an hour, we will address how sound financial strategies may provide the creative solutions you need to help stretch your retirement income.

We will focus on strategies designed to help you:

- **Make the most of your retirement income streams**
- **Tap into your retirement accumulations**
- **Understand retirement plan distribution rules**
- **Invest for stability, income, and growth potential**
- **Make informed financial decisions to address your needs**
- **Utilize financial vehicles that could last a lifetime**
- **Protect your income and assets from the unexpected**
- **Prepare for a more comfortable and rewarding retirement lifestyle**

Perhaps best of all, to help 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 can take advantage of this excellent educational opportunity. You are welcome to bring a friend 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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Helping Your Money Last in Retirement



Come join us for an educational workshop designed to help you make the most of your retirement income streams, tap into your retirement accumulations, understand retirement plan distribution rules, invest for stability and income, and utilize financial vehicles that could last a lifetime.

Retirement Income

(DAY, DATE)

(TIME)

(LOCATION)

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

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Disclosure area