

# 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.



# Will You Have Enough Money to Retire?

Many Americans underestimate how much money they will need to save by the time they retire. Perhaps that's because only 48% of workers have tried to calculate how much money they will need in order to retire comfortably. Those who have performed a retirement-needs calculation were twice as likely to be very confident about being able to live comfortably in retirement compared with those who haven't calculated how much they will need.<sup>1</sup>

Source: 1) Employee Benefit Research Institute, 2016

Join us for an educational workshop that focuses on:

- **Calculating the cost of retirement**
- **Developing sources of retirement income**
- **Determining your retirement goals**
- **Implementing strategies for retirement investing**
- **Managing your retirement portfolio in light of market volatility**
- **Potentially safeguarding assets from the unexpected**

When you attend the workshop, you will receive a full-color, 20-page workbook on preparing for retirement. This resource features essential information, exercises, and questions that are designed to 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.

## Preparing for 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 ).

*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.*

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# Preview



**Will You  
Have  
Enough  
Money to  
Retire?**

Many Americans underestimate how much money they will need to save by the time they retire.

Perhaps that's because only 48% of workers have tried to calculate how much money they will need in order to retire comfortably. Those who have performed a retirement-needs calculation were twice as likely to be very confident about being able to live comfortably in retirement compared with those who haven't calculated how much they will need.<sup>1</sup>

You are invited to attend an educational workshop where we will focus on sound strategies to help you pursue a comfortable retirement.

Source: 1) Employee Benefit Research Institute, 2016

# Preview

## **Preparing for 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 )

## Will You Have Enough Money to Retire?

( DATE )

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

Dear ( NAME ):

Many Americans underestimate how much money they will need to save by the time they retire. Perhaps that's because only 48% of workers have tried to calculate how much money they will need in order to retire comfortably. Those who have performed a retirement-needs calculation were twice as likely to be very confident about being able to live comfortably in retirement compared with those who haven't calculated how much they will need.<sup>1</sup>

### **Don't reach retirement unprepared.**

- **With life expectancies stretching, a 65-year-old can expect to live 20 years or more in retirement.**
- **Pension plans are eroding and the future of Social Security is uncertain. Your personal savings may become your largest source of income in retirement.**
- **Experts suggest that you may need 70% to 80% of your pre-retirement income to maintain your lifestyle during retirement.**
- **About half of today's retirees say they left the workforce earlier than they had planned.<sup>2</sup>**

Fortunately, there are sound financial strategies you can use to pursue a comfortable retirement. I am presenting a special workshop, *Preparing for Retirement*, 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 preparing for retirement. This resource features information, exercises, and questions designed to help you make sound financial decisions. The workbook was prepared especially for my *Preparing for Retirement* workshop, and it contains important information you'll 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 filled with sound financial strategies you can use to help prepare for retirement.

**In just one hour, you'll hear about:**

- **Calculating the cost of retirement**
- **Developing sources of retirement income**
- **Determining your retirement goals**
- **Implementing strategies for retirement investing**
- **Managing your retirement portfolio in light of market volatility**
- **Potentially safeguarding assets from the unexpected**

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.

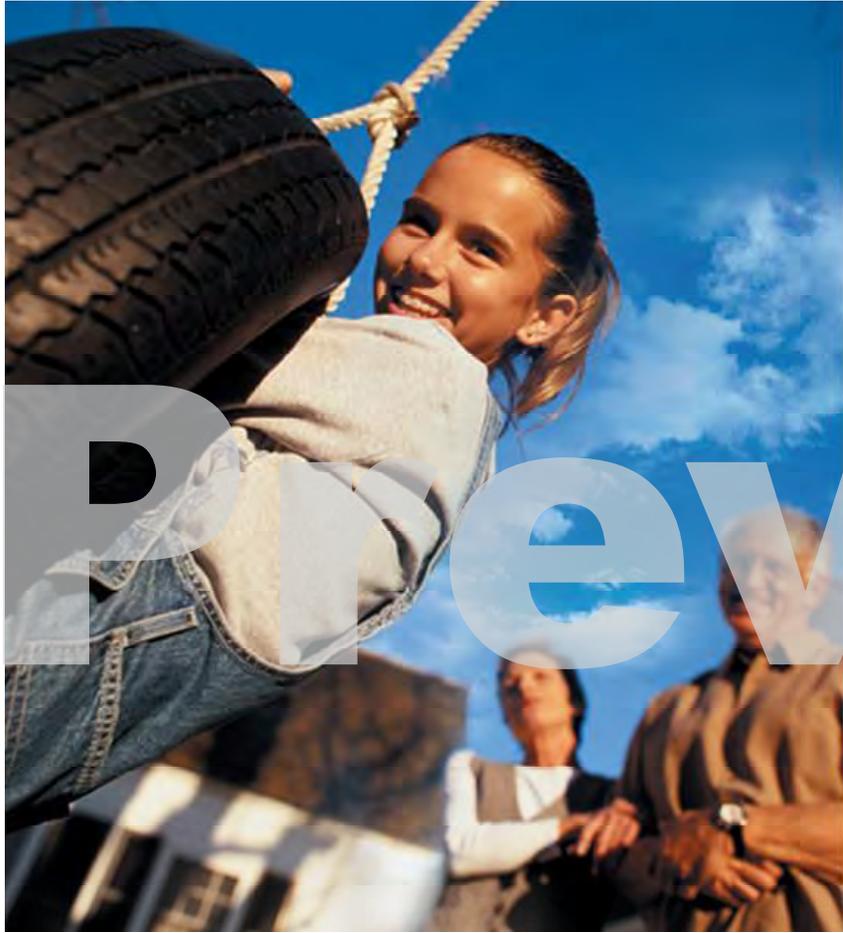
I hope you will take advantage of this excellent opportunity. You are welcome to bring a friend to the workshop. Seating is limited, however, so call ( YOUR PHONE NUMBER ) today to reserve your place and your workbook.

Sincerely,

( YOUR NAME )  
( YOUR TITLE )

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Source:  
1-2) Employee Benefit Research Institute, 2016



**Will You  
Have  
Enough  
Money to  
Retire?**

**Preview**

Join us for an educational workshop designed to help you calculate the cost of retirement, develop a plan to pursue your goals, and consider strategies for investing and potentially protecting your retirement portfolio.

## **Preparing for Retirement**

( DAY, DATE )

( TIME )

( LOCATION )

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

*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)