

# 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.

# Taking Control

## Financial Strategies for Women



Women today have careers, start businesses, run households, raise children, and help aging parents. These competing priorities can get in the way of planning for a comfortable financial future. But by taking care of yourself financially, you may be able to take better care of the ones you love.

These concerns are addressed in my upcoming ***Taking Control*** workshop, which focuses on personal finances from a woman's perspective. The educational presentation is designed to help you strengthen your financial future and covers these important action items:

- **Getting your financial house in order**
- **Preparing for the unexpected**
- **Putting your money to work by investing**
- **Building a healthy nest egg for retirement**
- **Facing financial hardship**
- **Addressing estate and legacy issues**

The workshop offers sound, practical strategies that you can use immediately. I'll also cover specific information for women who face divorce or widowhood, as well as many other concerns that could directly affect your finances, such as maintaining good credit and maximizing Social Security benefits.

Everyone who attends will receive a full-color, 20-page workbook filled with a wealth of information and exercises, which are designed to help you assess your current situation and make sound financial decisions. Perhaps best of all, you will be eligible for the complimentary consultation offered to all workshop participants.

## Taking Control: Financial Strategies for Women

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 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 investment company, 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

## **Taking Control**

### **Financial Strategies for Women**



Women today have careers, start businesses, run households, raise children, and help aging parents. These competing priorities — and other challenges — can get in the way of planning for a comfortable financial future. But by taking care of yourself financially, you may be able to take better care of the ones you love.

Join us for an educational workshop for women.

We will discuss topics ranging from investment fundamentals to retirement strategies, maximizing Social Security benefits, and preparing for the unexpected, including divorce and widowhood.

Preview

## **Taking Control**

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 )

## Taking Control: *Financial Strategies for Women*

( DATE )

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

Dear ( NAME ):

Women today have careers, start businesses, run households, raise children, and help aging parents. These competing priorities can get in the way of planning for a comfortable financial future. But by taking care of yourself financially, you may be able to take better care of the ones you love.

When preparing for the future, you may face a number of obstacles. Being adequately prepared to meet whatever challenges come your way may be more important than you think, especially when you consider these financial facts:

- The ratio of female-to-male weekly earnings for full-time workers was 82.2% in 2016.<sup>1</sup>
- Women work an average of 12 years less than men.<sup>2</sup>
- Mothers experience more career interruptions than fathers, primarily to care for their families.<sup>3</sup>
- Women are three times more likely than men to become widowed.<sup>4</sup>
- About two-thirds of informal (unpaid) caregivers are women.<sup>5</sup>

These concerns are addressed in my upcoming **Taking Control** workshop, which focuses on personal finances from a woman's perspective. Please join me on ( DAY, DATE ) from ( TIME ) to ( TIME ) at ( LOCATION ). This educational presentation is sponsored by ( YOUR FIRM'S NAME ).

The workshop is designed to help you strengthen your financial future. It covers important financial concerns such as maintaining good credit, paying for college, and maximizing Social Security benefits. I'll also have specific information for women who face divorce or widowhood, as well as many other concerns that could directly affect your family's finances. The presentation offers sound, practical strategies that you can use immediately.

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**In about an hour, we will focus on six key action items designed to help you:**

- **Get your financial house in order**
- **Prepare for the unexpected**
- **Put your money to work by investing**
- **Build a healthy nest egg for retirement**
- **Face financial hardship**
- **Understand your Social Security options**
- **Address estate and legacy issues**

Let me assure you that this workshop is strictly educational. There is no cost for attending, and no specific products will be offered for sale. Everyone who attends will receive a full-color, 20-page workbook that contains a wealth of information, including exercises that are designed to help you assess your current situation.

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.

It doesn't matter whether you're single or married, widowed or divorced — every woman today needs to plan ahead for personal and family security. So I hope you will take advantage of this opportunity to prepare financially. You are welcome to bring a friend or significant other to the workshop. Seating is limited, however, so call ( YOUR PHONE NUMBER ) today to reserve your place and your workbook. You have so much to gain by taking control.

Sincerely,

( YOUR NAME )  
( YOUR TITLE )

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Sources:

- 1) U.S. Bureau of Labor Statistics, 2016
- 2) *Money*, May 5, 2016
- 3) Pew Research Center, October 1, 2015
- 4) U.S. Census Bureau, 2016
- 5) Alzheimer's Association, 2016

# Taking Control

Financial Strategies  
for Women



Join us for an educational workshop that focuses on personal finances from a woman's perspective. The presentation offers sound, practical strategies that you can use immediately to help pursue a more comfortable financial future. In about an hour, we'll cover topics ranging from investing to retirement, to maximizing Social Security benefits and preparing for the unexpected, with specific information for women who face divorce or widowhood.

### **Taking Control**

( DAY, DATE )

( TIME )

( LOCATION )

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

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