

Seminar Invitation Highlights

The New Rules of Retirement Saving

Below are key messages you can use if crafting your own seminar or workshop invitation.

Need help? Stonewood has partnered with the industry's leading direct marketing firms to provide turn-key mail and digital solutions for our seminars. Email ESmith@StonewoodFinancial.com to learn more.

Event positioning:

- Tax-Smart Saving Event
- Special Topic Workshop: Taxes, Income & Retirement

Event messaging:

- Learn how to plan a retirement that benefits YOU – not the IRS.
- Stop saving with outdated rules.
- Is your savings approach aligned with today's tax and market realities?

Seminar topic highlights:

- Why taxes may be the **biggest retirement risk** you haven't planned for
- How to identify (and eliminate) **your 3 biggest retirement risks**
- **Key indicators** that your retirement approach may be outdated
- Why today's market requires **specialized planning** to meet your retirement goals
- The **difference between tax-deferred and tax-free saving** – and how to know which one is right for you.

Can include:

- Attend and receive a complimentary copy of *The New Rules of Retirement Saving*, the leading book on creating a retirement aligned with today's market and tax realities.