

Real World Retirement Planning – *YOUR Three-Legged Stool!*

What everyone needs to know about building your financial independence but are afraid to ask!

Attend this Informational Meeting to discover YOUR choices and what you need to know to make the most of cash flow and investment plan. Discover a few tax tips along the way.

Complete a Cash Flow report prior to the presentation to truly understand where your financially stand – knowledge is power, and you must understand your expenses & income.

Discover the value of Morningstar and the simple secrets the professional use identify funds that have produced strong risk-adjusted performance relative to their peers - Morningstar's rating system is completely objective and unbiased.

And remember that everyone's situation is different – please ensure that you review your own personal financial roadmap before committing to any investment plan.

Wednesday,

Dates: March 8, 2023

Time: 5PM – 6:30PM

Location: Virtual WebEx Meeting

Please register at <http://catalog.ocps.net/> to receive the WebEx invite (hit

Ctrl key and click to follow link) *For additional information, call*

407-317-3227

Presented by: Helen Von Dolteren-Fournier, Attorney, Certified Financial Planner

SPHR of AEGIS Law Firm

