You're Invited!

MANAGING RISKS IN THE RETIREMENT RED ZONE & LEGACY PLANNING STRATEGIES

Join us on September 23!

JOIN THIS EXCLUSIVE EVENT!

Hosted by:

Tiby Saunders
Wealth Manager,
Financial Advisor
Cetera Investors

Featured guest speaker and sponsor:

Herb Phillips
Regional Vice President
Prudential Annuities®

Guest speaker:

Adam Brodman
Regional Vice President
Prudential Individual Life

Managing Risks in the Retirement Red Zone will provide a detailed discussion on the challenges of managing income in retirement. We will discuss myths in retirement planning, risks in retirement and creating a plan that could withstand some of the predictable threats to retirement income. Topics of conversation will include in depth conversation on seven common risks to retirement income including, market risk, interest rate risk, investor behavior, inflation, longevity and withdrawal rate risk.

Legacy Planning Strategies focuses on the importance of legacy planning, legacy planning strategies, and estate planning for retirement assets. We will also review the current and proposed gift and estate tax environment, the use of trusts, gifting strategies, and leveraging restricted or predetermined beneficiary payout options.

Thursday, September 23, 2021
1:00 PM - 3:00 PM
ASALH's 106th Annual Conference

For additional information, ,
Tiby Saunders at (215) 568-2078 ext. 111 or by tiby.saunders@ceterainvestors.com

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