

Bust-Through Marketing for a Great Year-End

Your Hosts: Sean Bailey,
Horsemouth Editor-In-Chief

Devin Kropp
Horsemouth Associate Editor

August 2018



What Do You Need?

- What would your year look like if it ended tomorrow?
- How do you want it to look?
- How do you fill the gap?



Gap Analysis

How much in assets do you need?	\$20 million
What is your average account size?	\$500,000
How many clients do you need to sign?	40
What is your closing ratio?	50%
How many prospects to see?	80
How many prospect meetings per week?	5 (80 prospects/17 weeks)

Advisor/Client Fills In the Gaps

- Tactical Ideas
- Marketing Campaigns
- Action Plans
- Strategy Boot Camps



50+ Campaigns

Client-Facing "Tools"

Savvy Cybersecurity Quick Reference Guide, 2018

Teresa A. Sampton, CFP®, CPA
Vice President
Sampton Wealth Management
123 Main Street
New York, NY 10018
888-336-6884
tsamptona@samptonwealth.com
www.samptonwealth.com



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Wealth Management Group

A. Scenario

Review the following questions. Determine how your client's situation might differ from the scenario. Then review the checklist and complete the action plan.

Question	Answer	Notes
1. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
2. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
3. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
4. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
5. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
6. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
7. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
8. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
9. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18
10. Have you used a third-party vendor for your online banking accounts? Do you have a secure, encrypted connection? Do you have a secure, encrypted connection?	Yes/No	6/18/18


B. Summary

1. Update all software on all devices.
2. Use secure connections for all online banking.
3. Use secure connections for all online banking.
4. Use secure connections for all online banking.
5. Use secure connections for all online banking.
6. Use secure connections for all online banking.
7. Use secure connections for all online banking.
8. Use secure connections for all online banking.
9. Use secure connections for all online banking.
10. Use secure connections for all online banking.

Cybersecurity Checklist 2018

MEDICARE FOR INDIVIDUALS 65+

Teresa A. Sampton, CFP®, CPA
Vice President
Sampton Wealth Management
123 Main Street
New York, NY 10018
888-336-6884
tsamptona@samptonwealth.com
www.samptonwealth.com



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PREMIUMS AND DEDUCTIBLES FOR 2018

Plan	2018 Premium	2018 Deductible	2018 Out-of-Pocket	2018 Catastrophic Coverage
Part A	\$0	\$0	\$0	\$0
Part B	\$134	\$1,330	\$6,850	\$8,000
Part C	\$134	\$1,330	\$6,850	\$8,000
Part D	\$4.00	\$0	\$0	\$0

2018 Medicare Enrollment Periods

Initial Enrollment Period: Oct 15 - Dec 15, 2017
 General Enrollment Period: Jan 1 - Mar 31, 2018
 Special Enrollment Period: Any time during the year if you qualify.

Medicare 2018

KEY FINANCIAL DATA 2018

Teresa A. Sampton, CFP®, CPA
Vice President
Sampton Wealth Management
123 Main Street
New York, NY 10018
888-336-6884
tsamptona@samptonwealth.com
www.samptonwealth.com



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Account	Balance	Interest	Dividends	Capital Gains
Checking	\$12,345	\$123	\$456	\$789
Savings	\$56,789	\$567	\$1,234	\$2,345
Investment	\$123,456	\$1,234	\$5,678	\$9,012
Retirement	\$345,678	\$3,456	\$12,345	\$18,901
Real Estate	\$789,012	\$7,890	\$23,456	\$34,567
Life Insurance	\$1,234,567	\$12,345	\$45,678	\$67,890
Other	\$98,765	\$987	\$3,456	\$5,678
Total	\$2,768,543	\$27,685	\$98,765	\$145,678

Key Financial Data 2018

Key Tax Changes

Teresa A. Sampton, CFP®, CPA
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tsamptona@samptonwealth.com
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TYPE	NEW LAW	OLD LAW	COMMENT
Retirement	Higher contribution limits for 401(k) and IRA plans starting in 2018.	Lower contribution limits.	Beneficial for high earners.
Charitable	Higher charitable deduction limits for 2018.	Lower deduction limits.	Beneficial for high-net-worth individuals.
Capital Gains	Changes to capital gains tax rates for 2018.	Older rates.	Beneficial for investors.
Estate	Changes to estate tax rates and exemptions for 2018.	Older rates and exemptions.	Beneficial for estate planners.

Key Tax Changes

2018 Retirement Calendar Checklist

Teresa A. Sampton, CFP®, CPA
Vice President
Sampton Wealth Management
123 Main Street
New York, NY 10018
888-336-6884
tsamptona@samptonwealth.com
www.samptonwealth.com



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YOUR BULLETIN BOARD GUIDE TO STAYING ON TRACK!

Use this calendar checklist to track important deadlines and actions you must take for your finances and health care. Questions? Just give us a call and we'll be glad to help. (Note: No deadlines in May, July, or August.)

JANUARY	FEBRUARY	MARCH
<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)
APRIL	JUNE	SEPTEMBER
<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)
OCTOBER	NOVEMBER	DECEMBER
<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)	<input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Feb. 1st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare Advantage Enrollment Period starts (ends Mar. 31st) <input type="checkbox"/> 1st Medicare General Enrollment Period starts (ends Mar. 31st)


Retirement Calendar Checklist

Special Reports/Lead Magnets

21 Key Stats for Tracking Your Financial Health

Knowing your numbers helps you stay healthy, wise and wealthy.

Teresa Sampston, President
Sampston Wealth Management
www.sampstonwealth.com



Reliance Rate

Find your number:
(Expected Spending – Non Portfolio Sources of Income) / Investment Portfolio

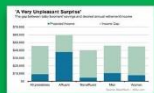
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What it is: Your reliance rate measures how much you depend on your investment portfolio to fill your expense gap.

Example: Say you'll need \$100,000 a year in retirement income. If \$70,000 comes from your portfolio and \$30,000 comes from other sources, your reliance rate is 70%.

Why you need it: A high reliance rate indicates a high dependence on your portfolio to meet expenses. You will be much more sensitive to market volatility since more of your income will fluctuate along with the market. A low reliance rate signals a lower exposure to the market and you can expect smaller and maybe fewer fluctuations in your retirement income.


The bottom line is that the higher your reliance rate, the more market declines will affect your retirement income. Or to say it another way, the higher your reliance rate, the more flexible you need to be with your spending during retirement in order to compensate for market fluctuations.



www.SampstonWealthManagement.com 1-800-555-1212

Lead Magnet w/Landing Page, Display Ads, & Lead Nurturing Emails

11 Biggest Rollover Blunders (and How to Avoid Them)



Blunder #1: Missing the 60-day Rollover Deadline

You have a 60-day window for moving money from your retirement plan to an IRA rollover account tax-free. The window starts the moment your money leaves the original account. Many people end up waiting that 60-day window and suffering the consequences.

How it might happen
First of all, you look receipt of the money rather than making a direct "trustee-to-trustee" transfer. The clock starts ticking and minor problems and roadblocks eat up the time. The clock gets lost in the mail. You're on vacation when it comes in. You lose track of the day. Before you know it, the 60-day window has closed.

Or one of your financial institutions could make a mistake. They might put the money into your taxable account instead of your rollover account, and you don't notice it until after the 60-day window closes.

The consequences
In this case, the price for carelessness is high. The whole distribution will be taxable in one year. And if you're under 59-1/2, you'll pay a 10% penalty on top of it.

How to avoid it
Request a direct transfer of the assets. Open an account with a trustworthy, reputable custodian. Then ask your plan administrator to send the assets to the new custodian. That way, you never touch the money and there's no risk that the check will get lost or you'll lose count of the days. Also, if the assets go straight to the new custodian in a direct transfer, your plan administrator won't have to withhold 20% for taxes.

How to rectify it
Talk to the IRS. The IRS softened its policies against missing the 60-day rollover deadline in 2001. If the delay was demonstrably caused by the financial institution, you can get an automatic waiver.

You also might be able to get a discretionary waiver if the error was caused by a hardship circumstance such as a death or disability, or if it was caused by a postal error. But really, you don't need the waiver. The better thing to do is avoid the mistake to begin with and choose a reputable custodian and request a direct, trustee-to-trustee transfer.

A SPECIAL RETIREMENT
By Teresa Sampston, CFP®
Director of Retirement and Life Planning

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Special Report or 11-Touch Email Blast

Client & COI Presentations

Navigating the Complexities of
the New Medicare Tax

FINDING OPPORTUNITIES TO BETTER SERVE OUR CLIENTS

Advisor Name
Firm Name

Reviewed by: Debra Taylor, CPA/PPS, Esq.

Life After Work


How to Create a Good Life in Retirement



LinkedIn for CPAs
12 Ways to Leverage LinkedIn in Marketing Your Firm

Your Name
Firm Name

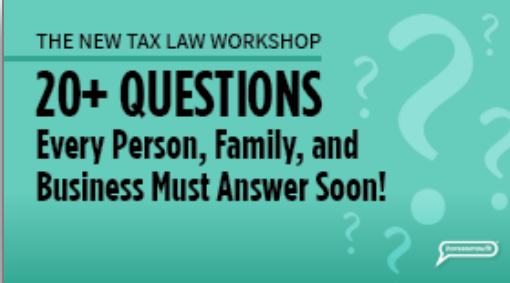
[Disclosures]



THE NEW TAX LAW WORKSHOP

20+ QUESTIONS

Every Person, Family, and
Business Must Answer Soon!



1 Hour to Savvy Cybersecurity:

10 Threats Every Person and Business
Faces—and How to Fight Them Now

10



Advisor Name
Firm

Disclaimer

How to Get Rollover Ready!

Rollovers can be tricky!
Explore your options for
funding a comfortable and
sustainable retirement.

Hosted by:




Rollover Ready | Advisor Name

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Includes PowerPoint Slide Decks, Scripts & Toolkits

Sales Letters



A volatile year ends with a whimper

The Dow Jones Industrial Average is made up of 30 large, well-known companies. It is the best known and oldest of the many yardsticks that measure stock market performance.

While not necessarily a household name, the S&P 500 Index—as its name implies—is made up of 500 larger U.S. companies. It captures about 80% of the entire market capitalization GDP Dow Jones Index), and is the most often quoted measure of market performance among analysts.

While the S&P 500 made significant advances in 2013 and 2014, this past year action in stocks fell more like 2011, when investors tremors reached our shores. While 2013's ride was not as volatile as that of 2011, the S&P 500 did experience its first 10%+ decline in four years (St. Louis Federal Reserve). In both years, the benchmark index ended the year pretty much where it started.

Meanwhile, longer-term Treasuries yields continue to fall and there's still plenty of interest in the most creditworthy.

We did, however, see modest backup in bond yields as measured by the Bloomberg Barclays US Corporate MBS Resilience and longer problems in high-yield bonds, some


Table 1: Key Index Returns

	MTD %	2014
Dow Jones Industrial Average	-1.66	-12
RUSSELL 2000 Composite	-1.88	-14
S&P 500 Index	-1.76	-13
Bloomberg 2000 Index	4.52	15
MSCI World ex USA**	-1.88	-14
MSCI Emerging Markets**	2.48	10

Source: First Street Research, NBER.com, IFRD returns from 10/1/2013 returns. Dec. 31, 2014–Dec. 31, 2015 Annualized. **USD

Essential vs. diversified investing
If I touch on some of the issues affecting high-yield and performance in key stock and fixed income sectors in a

Monthly Market Updates



Dear Bob:

Is there anything as stressful as tax season? To stay healthy and happy—not to mention productive—it is important to take time to de-stress throughout your day. A few minutes of relaxation can clear your mind and get you back on track. Here are five good relaxation apps we have found:

- GPS for the Soul**
<https://itunes.apple.com/us/app/gps-for-the-soul/id986992426?mt=8>
- Nature Music Lite**
<https://itunes.apple.com/us/app/free-nature-music-for-help/id428782837?mt=8>
- PIP Stress Tracker**

Appealing to your senses, this app uses nature-based soundtracks to relax your mind. You can view beautiful collections of photos that match a variety of uniquely calming sounds. You can also create your own playlist by combining the sounds that feel most soothing to you. These ambient nature sounds can let you escape the constant interruption of ringing phones for a few minutes to refresh yourself and refocus. Nature Music Lite is available for free on iTunes.

Seasonal Emails



9 Liberty Rock Rd., Suite 19
Peoria, IL 61601
(312) 456-7890
www.wealthmanagement.com

Dear Bob:

Tax season is over! And now that it's behind us, I wanted to make you aware of a "concierge" service I offer only at certain times of the year.

We know that friends and family are a vital part of your life, and when we see loved ones facing perplexing financial issues, we want to help.

Now that taxes are filed, I have some firm anyone you care about who could use some help.

Think of me as a help desk! While I can't investment recommendations, I can offer resour from some of your favorite people:

- The newly married – How much mortgage is too m
- Mom – How much assisted living can we afford?
- Neighbor – What are some options in selling a bu
- New wife – What is wedding debt?
- College grad – How to manage college loans?
- Falling badly – Is it time to deem Social Security
- Co-worker – Should I take the jump start?
- Retiree – Is my spending on track with my income

It's not a service we advertise (and there's to make you aware of it. We offer this assistance never an obligation. This is just a resource I can

So, if any of your friends, family, or collea guidance or just would like to ask a question or t too big or too small.

And, of course, I am always here for you if you n

Adam

Adam Sample
Certified Financial Planner
adam@wealthmanagement.com

Advisory Services offered through Wealth Management Group, a Registered Investment Advisor. Securities offered through Wealth Management Group, member FINRA/SIPC.

Referral Letters



9 Liberty Rock Rd., Suite 19
Peoria, IL 61601
(312) 456-7890
www.wealthmanagement.com

Dear Margaret,

Thank you for meeting me at the New Year's Eve fundraiser for St. Jude Children's Hospital. I enjoyed our discussion about the holidays and your plans to open another physician practice this year. With two medical clinics already under your leadership, it sure looks like a busy and exciting year ahead for you!

I work as a financial planner with Sampleton Wealth Management, and would like to explore further how my firm might be able to assist you in building a long-term financial plan.

I specialize in retirement planning and have worked with countless senior executives and business owners in tackling these matters. I take the time to get to know each client and tailor my investment and financial approach to their specific needs and circumstances.

Since its inception, my firm has focused primarily on delivering exceptional service to all of our clients. We have now reached the point where we have to limit the number of new clients we take each year so we can deliver our brand of highly personalized service. That said, I have a couple of openings available this year and would be happy to explore whether our services might be of benefit to you.

I'd like to call you personally in the next couple of days to see if I can be of some help or at least answer any questions you may have. And you can always reach me at teres@sampletonwealth.com or 212-111-2222.

Sincerely,

Terry

Advisory Services offered through Wealth Management Group, a Registered Investment Advisor. Securities offered through Wealth Management Group, member FINRA/SIPC.

Prospect Letters

Marketing Resources for You

List of Services						
Investment Planning	Retirement Planning	College Planning & Philanthropy	Risk Management & Insurance	Cash Flow & Budgeting	Family Services	Tax Management
Portfolio Management & Risk Analysis	Retirement Goal Setting	Wills	Reviews of Existing Policies	Cash Flow Analysis	College Savings Planning	Review of Cost Basis
Asset Allocation & Diversification	Social Security Analysis	Writers of Attorney	Life Insurance Needs	Expenses & Budgeting	529 College Savings Plans	Review Disabled Goals
Concentrated Stock Positions	Business Planning	Estate Willing	Long Term Care Insurance	Debt Management	Roth IRAs for Children	Carry Forward Losses
Asset Location	IRA Conversions & Withdrawals	Health Care Proxy	Disability Insurance	Planned Purchases	CFRD	Tax Loss Harvesting
Investment Risk Control Strategy	401(k) Management & Employee Sponsored Plans	Charitable Giving	Health Insurance	Emergency Savings	Estate Planning	Deductions & Credits
Second Opinion Reviews	Annuitties & Pensions	Guidelines for Minor Children	Husband's & Wives's Separation	Marriage Review	Estate Planning	Planned Roth Conversions
Portfolio Review/Testing	IRAs & IRMAAs Strategies	Asset Protection Analysis	Estate Litigation	Lines of Credit	Divorce & Postdivorce Services	IRAs & PLAs

List of Services Template

The Financial Advisor's Marketing Calendar



A complete year of financial deadlines, special observances, holidays, and communication themes for contacting clients, prospects, referrals and COIs.



Take Control of Your Numbers!

21 Key Stats for Tracking Your Financial Health

Do you ever find yourself wondering where all your money went at the end of the month? If you overinvest or grow too much, a mortgage payment, or a potentially lucrative investment opportunity fall through the cracks?

Our special report "21 Key Stats for Tracking Your Financial Health" can give you tighter control and peace of mind by how to manage your assets and liabilities, focusing on the right numbers can lead to better decisions about personal expenses, credit, investments, and retirement.

Are you on track?

This special report can help you:

- Position your cash for emergency expenses and income disruptions
- Leverage your home equity for a new line of credit or a reverse mortgage
- Manage your income to avoid higher tax additional taxes
- Budget effectively for fixed expenses to maintain savings
- Estimate your how much you'll need to retire

Get your FREE report on "21 Key Stats for Tracking Your Financial Health" now!

First Name:

Last Name:

Best Email:

Send Me The Stats!

Sampleton Wealth Management Group
123 Main Street, 12th Floor, New York, NY 10018
(212) 555-1111 ext. 30
www.sampletonwealth.com


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Support Materials



Monthly Webinars



CPE Credits Guide

What you need to do to award Continuing Education Credits (CPE) to CPAs

Instruction & Guidance

2016 FastStart Marketing Plan

Marketing Objectives: Establish goals & budgets

Target Market: High net worth individuals with \$250k+ in assets

Brand: Advisor/Client

Tone/Content: Professional

Core Marketing Systems: *Summarize your strategy for each marketing system*

System	Activity	Timing	CPA	CPA	CPA	CPA	CPA
Brand	Local Seminar	Q1	X	X	X	X	X
	Client Service Review	Q1	X	X	X	X	X
Communications	Client Alerts	Q1	X	X	X	X	X
	Local News Channel	Q1	X	X	X	X	X
Referrals	Referral Database	Q1	X	X	X	X	X
	Referral Bids	Q1	X	X	X	X	X
Preparation	CPA Meeting	Q1	X	X	X	X	X
	Website Content	Q1	X	X	X	X	X
CPE Marketing	CPA Seminar	Q1	X	X	X	X	X
	CPA Seminar	Q1	X	X	X	X	X

Campaign Calendar: *Schedule campaign events*

Jan	February	March
Key Event	Key Event	Key Event
Local Seminar	Local Seminar	Local Seminar
CPA Meeting	CPA Meeting	CPA Meeting
CPA Seminar	CPA Seminar	CPA Seminar
CPA Seminar	CPA Seminar	CPA Seminar
CPA Seminar	CPA Seminar	CPA Seminar
CPA Seminar	CPA Seminar	CPA Seminar
CPA Seminar	CPA Seminar	CPA Seminar

Game Plan: *Plan your activities*

Phase	Activity
Daily	Marketing
Weekly	Marketing
Monthly	Marketing
Quarterly	Marketing
Yearly	Marketing

Marketing Metrics: *Choose key performance indicators to track*

	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Referrals												
Client Service												
Marketing Spend												

Worksheets, Checklists, Marketing Plans, Schedules, Templates

Still Time to Give a Workshop or Webinar!



Life After Work
How to Create a Good Life in Retirement

Presented by
[Name]
(Firm name)
(Disclosures)

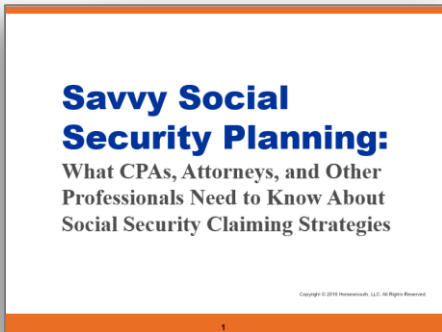


How to Get Rollover Ready!

Rollovers can be tricky!
Explore your options for funding a comfortable and sustainable retirement.

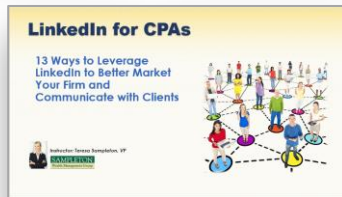
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Rollovers Ready | Advisor Name
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Savvy Social Security Planning:
What CPAs, Attorneys, and Other Professionals Need to Know About Social Security Claiming Strategies

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LinkedIn for CPAs

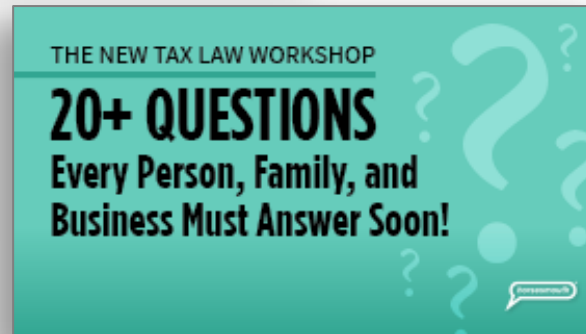
13 Ways to Leverage LinkedIn to Better Market Your Firm and Communicate with Clients

Author: [Name], CPA
[Firm Name]



1 Hour to Savvy Cybersecurity:
10 Threats Every Person and Business Faces—and How to Fight Them Now

Advisor Name
Firm



THE NEW TAX LAW WORKSHOP

20+ QUESTIONS Every Person, Family, and Business Must Answer Soon!

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7 Super Simple Marketing Ideas

Duuude!

Whoa!

1. Find a Date to Celebrate



The Financial Advisor's Marketing Calendar

2018

A complete year of financial deadlines, special observances, holidays, and communication themes for contacting clients, prospects, referrals and COIs.

September

Commonly Observed Holidays

- Sep 3. Labor Day (markets closed)
- Sep 3. Labour Day (CA)
- Sep 9-11. Rosh Hashanah
- Sep 18-19. Yom Kippur

Financial Dates & Deadlines

- Sep 17. 3Q 2018 estimated taxes due
- Sep 17. 2017 extended partnership returns due
- Sep 17. 2017 extended S-corp returns due
- Sep 30. Last day to determine beneficiaries after IRA owner's death

Business & Industry

- Mortgage Professional Month
- Update Your Resume Month

- Sep 4. Newspaper Carrier Day
- Sep 18. Air Force Birthday
- Sep 20. IT Professionals Day
- Sep 22. Business Women's Day
- Sep 29. VFW Day

Cause Observances

- Baby Safety Month
- Childhood Cancer Awareness Month
- Hispanic Heritage Month (Sep 15-Oct 15)
- Prostrate Cancer Awareness Month
- Healthy Aging Month

- Sep 5. Day of Charity
- Sep 8. International Literacy Day
- Sep 9-15. Assisted Living Week
- Sep 11. Patriot Day
- Sep 14. Stand Up to Cancer Day
- Sep 17. Constitution/Citizenship Day
- Sep 21. International Day of Peace
- Sep 27. Family Health & Fitness Day

Special Observances

- College Savings Month
- Better Breakfast Month
- Intergeneration Month
- Self Improvement Month

- Sep 7. Food Bank Day
- Sep 7-9. U.S. Open Finals (tennis)
- Sep 8. Tailgating Day
- Sep 9. Grandparents Day
- Sep 12. Day of Encouragement
- Sep 16. Stepfamily Day
- Sep 17. Wife Appreciation Day
- Sep 19. Talk Like a Pirate Day
- Sep 22. Autumn Equinox
- Sep 24-30. Dog Week
- Sep 28. Good Neighbor Day
- Sep 30. Podcast Day



October

Commonly Observed Holidays

- Oct 8. Columbus Day (markets open)
- Oct 8. Thanksgiving (CA)
- Oct 31. Halloween

Financial Dates & Deadlines

- Oct 1. FAFSA 2019-2020 opens
- Oct 1. Final deadline for self-employed & small businesses to establish SIMPLE IRA for 2018
- Oct 2. 2017 extended trust & estate returns due
- Oct 15. Medicare open enrollment begins
- Oct 15. 2017 Extended individual tax returns due
- Oct 17. Final deadline to fund SEP or solo 401(k) for extended 2017



Cause Observances

- AIDS Awareness Month
- Breast Cancer Awareness Month
- Bullying Prevention Month
- Health Literacy Month

- Oct 10. World Homeless Day
- Oct 10. World Mental Health Day
- Oct 14. Clergy Appreciation Day
- Oct 24. United Nations Day
- Oct 27. Make a Difference Day

Business & Industry

- Physical Therapy Month
- Chiropractic Month
- Photographer Appreciation Month

- Oct 2. Custodial Workers Day
- Oct 1-5. Customer Service Week
- Oct 7-13. Primary Care Physicians Week
- Oct 13. Navy Birthday
- Oct 14-20. Business Women's Week
- Oct 16. Boss's Day

Special Observances

- Cybersecurity Awareness Month
- Financial Planning Month
- Long-term Care Planning Month
- Organize Your Medical Information Month

- Oct 1. International Day of Older Persons
- Oct 1. International Coffee Day
- Oct 5. Do Something Nice Day
- Oct 8-12. Financial Planning Week
- Oct 11. Take Your Parents to Lunch Day
- Oct 14-20. Retirement Securities Week
- Oct 15-21. Estate Planning Awareness Week
- Oct 16. Boss's Day
- Oct 17. Support Your Local of Chamber of Commerce Day
- Oct 18. Get Smart About Credit Day

November

Commonly Observed Holidays

Nov 4. Daylight Savings Time ends
Nov 11. Veterans Day (markets opened)
Nov 11. Remembrance Day (CA)
Nov 22. Thanksgiving Day (markets closed)
Nov 23. Markets close at 1 p.m. ET

Financial Dates & Deadlines

Nov 1. 2019 health insurance open enrollment opens
Nov 30. Last day for doubling up to avoid wash sale rule

Business & Industry

Military Family Appreciation Month
Entrepreneurship Month

Nov 3. Love Your Lawyer Day
Nov 10. Marine Corps Birthday
Nov 24. Small Business Saturday

Cause Observances

Adoption Month
Alzheimer's Month
American Diabetes Month
Family Caregivers Month
Native American Heritage Month

Nov 4-10. Animal Shelter Appreciation Week

Nov 10. Marine Corps Birthday

Nov 10-18. Hunger & Homelessness Awareness Week

Nov 15. Great American Smokeout

Nov 20. Child Day (CA)



Special Observances

Family Stories Week
Long-Term Care Awareness Month
Vegan Month
Life-Writing Month

Nov 1. Dia de los Muertos (Day of the Dead)

Nov 4. NYC Marathon

Nov 8. Men Make Dinner Day

Nov 13. World Kindness Day

Nov 15. America Recycles Day

Nov 23. Black Friday

Nov 26. Cyber Monday

Nov 30. Computer Security Day

Special Days Resources



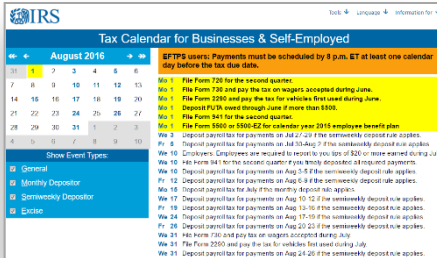
<http://www.nationaldaycalendar.com/>



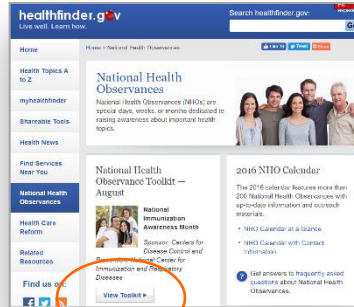
<https://www.healthcare.gov/quick-guide/dates-and-deadlines/>



<http://www.brownielocks.com/>



<http://www.tax.gov/calendar/>



<http://healthfinder.gov/nho/default.aspx>




<https://www.daysoftheyear.com/>

Look for Marketing Materials

August
National Immunization Awareness Month

Sponsor: Centers for Disease Control and Prevention, National Center for Immunization and Respiratory Diseases



Immunization, or vaccination, helps prevent dangerous and sometimes deadly diseases. To stay protected against serious illnesses like the flu, measles, and pneumonia, adults need to get their shots – just like kids do.

National Immunization Awareness Month is a great time to promote vaccines and remind family, friends, and coworkers to stay up to date on their shots.

How can National Immunization Awareness Month make a difference?
We can all use this month to raise awareness about vaccines and share strategies to increase immunization rates with our community.

Here are just a few ideas:

- Talk to friends and family members about how vaccines aren't just for kids. People of all ages can get shots to protect them from serious diseases.
- Encourage people in your community to get the flu vaccine every year.
- Invite a doctor or nurse to speak to parents about why it's important for all kids to get vaccinated.

Save & Share

- [Download full PDF \[372 KB\]](#)

Promote Your Event

- [Tips to plan a National Health Observance](#)

View All NHO Toolkits

[Select a Month ▾](#)


How can I help spread the word?
We've made it easier for you to make a difference! This toolkit is full of ideas to help you take action today. For example:


- Add information about immunizations to your newsletter.
- Tweet about National Immunization Awareness Month.
- Host a community event where families can get together and learn about immunizations.
- Add this Web badge to your website, blog, or social networking profile.

[Sample Announcement](#) | [Sample Tweets](#) | [E-cards](#) | [Web Badge](#) | [Get Involved](#) | [Share These Resources](#) | [More Information](#)

[Back to top ↑](#)

Get the Word Out

 [Sample Announcement for Newsletter, Listserv, or Media Release](#)

 [Sample Tweets](#)

It's important for kids to get their shots on schedule. Make an appointment for your child today: <http://1.usa.gov/XYqX3E>

[Tweet This!](#)


<http://healthfinder.gov/nho>

2. Show Them All You Do!





Create a List of Services for Your Firm

List of Services						
Investment Planning	Retirement Planning	Estate Planning & Philanthropy	Risk Management & Insurance	Cash Flow & Budgeting	Family Services	Tax Management
Portfolio Management & Risk Analysis	Retirement Goal Setting	Wills	Review of Existing Policies	Cash Flow Analysis	College Savings Planning	Review of Cost Basis
Asset Allocation & Diversification	Social Security Analysis	Powers of Attorney	Life Insurance Needs	Expenses & Budgeting	529 College Savings Plans	Review Realized Gains
Concentrated Stock Analysis	Business Planning	Living Will	Long Term Care Insurance	Debt Management	Roth IRAs for Children	Carry Forward Losses
Asset Location	IRA Contributions & Conversions	Health Care Proxy	Disability Insurance	Planned Purchases	Gifting	Tax Loss Harvesting
Investment Risk Control Strategy	401(k) Management & Employer-Sponsored Plans	Charitable Giving	Health Insurance	Emergency Savings	Elderly Planning	Deductions & Credits
Second Opinion Reviews	Annuities & Pensions	Guardians for Minor Children	Homeowner's & Renters Insurance	Mortgage Review	Legacy Planning	Potential Roth Conversions
Portfolio Stress-Testing	RMDs & Withdrawal Strategies	Asset Protection Analysis	Liability Coverage	Lines of Credit	Divorce & Widowhood Services	HSAs & FSAs

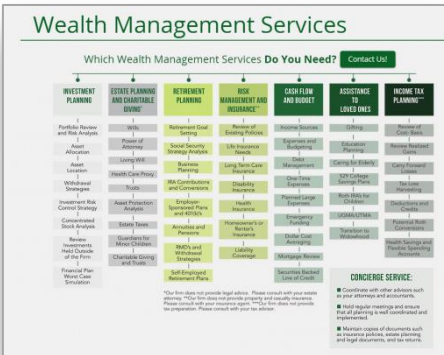
<p>Teresa Sampleton President Sampleton Wealth Management 123 Street Name, Town, State, 00000 name@companyname.com www.companyname.com</p>			<p>Disclosures: Your company disclosure information. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed augue nisi, elementum sed mattis id, tristique ac enim. Cras scelerisque fringilla dolor, sed fermentum justo dictum nec. Cras id mauris eleifend, suscipit purus id, fribus metus. Maecenas dignissim at nisi quis suscipit. Aliquam sagittis odio eget urna malesuada, id hendrerit diam molestie.</p>
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Create a List of Services for Your Specialty

Retirement Services						
Retirement Planning	Retirement Income Planning	Social Security Planning	IRAs & RMDs	Pensions	Annuities	Tax Planning for Retirement
Goal Setting	Review of Income Sources	Social Security Analysis	IRA Contributions	Lump Sum Analysis	Risk Review	Roth Conversions
Needs Analysis	401(k) Management	Disability	Roth IRAs	Find Lost Pensions	Income Replacement Analysis	Roth Recharacterizations
Retirement Plan Creation	Portfolio Review & Analysis	Spouse & Survivor Benefits	Rollovers	Cash-Balance Plans	Annuity Strategies	Tax Bracket Management
Estate Planning & Philanthropy	Inheritance Planning	Couple Coordination	Withdrawal Strategies	Single-Life vs. Joint-and-Survivor Analysis	Income Sustainability Projections	Asset Location
Debt Management	Cash Flow Projections	Special Needs Coordination	RMDs	Federal & State Pension Planning	Fees & Expense Management	Beneficiary Audit
Legacy Planning	Real Estate Investments	Filing Strategies	Self-Directed IRAs	Government Retirement Plan	Contract Reviews	Tax Loss Harvesting
Health Care Management	Reverse Mortgages	Medicare Planning	ROBS	Health Care Coverage	1035 Exchanges	Credits & Deductions

<p>Teresa Sampleton President Sampleton Wealth Management 123 Street Name, Town, State, 00000 name@companyname.com www.companyname.com</p>	 	<p>Disclosures: Your company disclosure information. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed augue nisl, elementum sed mattis id, tristique ac enim. Cras scelerisque fringilla dolor, sed fermentum justo dictum nec. Cras id mauris eleifend, suscipit purus id, finibus metus. Maecenas dignissim at nisl quis suscipit. Aliquam sagittis odio eget urna malesuada, id hendrerit diam molestie.</p>
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Easy to Scan



Services

Whether you are building events for the future – or seeking to protect, enjoy and pass on those you already have – Blue Spark Capital Advisors can help. Here are some of our areas of expertise:

- Investment Management**
 - Asset Allocation
 - Selection of money managers, funds and ETFs
 - Diversification of investments
 - Holistic review of all assets as part of your overall financial plan
- Retirement Planning**
 - When you can retire
 - How much you can spend on retirement
 - Strategies for creating a paycheck from your investments – so you don't outlive your money
- College Planning**
 - The best ways for your family to save for college
 - Sources of funding for tuition
 - Sorting through the financial aid confusion
 - Helping to explain FAFSA and private college forms
- Estate Planning**
 - Guidance on trusts and wills
 - How to reduce taxes for your heirs
 - Plan for the unexpected
- Risk Management**
 - Determining adequate level of life insurance
 - Analyzing whether long-term care insurance needed
 - Protecting your home and assets

Wills & Finance Events
 800-368-4444 • 603-883-8888
 1000 Main Street, Suite 200
 Boston, MA 02111 • Horsesmouth.com

Twitter



Promote Your List of Services Everywhere



Wealth Management Group
 9 Lewis Rock Rd., Suite 10
 Parsippany, NJ 07654
 (973) 456-7890
www.advisorclient.com

Dear Randall:

"I thought you just sold stocks," a long-standing client told me the other day. That surprised me! Sure, investment management is an important part of what we do, but it's just one of the many services we offer! So let me take a quick minute to outline everything we can do for you as a client! It's really 170+ services that we offer. These services rise and then, but they are always available when you do. They include:

- Project how much income you'll need in retirement
- Do a cash flow analysis on major purchases
- Create a long-term financial plan
- Help you develop a business exit strategy
- Create a behavioral retirement plan
- Review & update estate plans
- Calculate the best age for applying to Social Security
- Develop an asset protection strategy
- Review insurance policies for coverage and costs
- Analyze early retirement options
- Contact insurance and wealth advisors
- Complete college savings programs
- Review services & provider costs
- Review 401(k) portfolios

Services are also available - on a limited referral only basis - to assist your friends, family, and colleagues. If they require a complimentary second opinion or just a question answered, I'm happy to help.

So, give me a call any time you have a financial decision to make - big or small. We can bring the considerable resources of 170+ services to bear on whatever concern you are facing now or in the future. And, of course, I am always available to help you sort out your options. I'd much rather help you "take stock" than just sell stocks.

Warmest regards,
Alan
 Alan Demko, CFP®
alan@advisorclient.com



Advisor Services (These might include Wealth Management Group & Registered Investment Advisor Services (These might include Wealth Management Group, Registered Financial Planner)

3. Break Bread – Regularly



Monthly Event Formats

- Lunches
- Breakfasts
- Morning Coffee Club
- Teas
- Peer groups
- Book club
- Happy Hour
- Salons
- Open house/open office hours



UPCOMING EVENTS

MORNING BREW WORKSHOPS



At 10:00 am on the first Tuesday of each month, Blue Sky Financial Partners hosts free educational workshops. All are invited for coffee and pastries as we share information on topics that are timely and important.

Call to reserve your seat, and we'll see you at Blue Sky Financial in the upstairs workshop room.

4001 Murvihill Rd (in the Eagle Aircraft Building)
Valparaiso, IN 46383

Apr 7th : The Psychology of Money
Each of us has our own unique, financial fingerprint and have acquired different unconscious beliefs and behavioral patterns when it comes to money. Some are savers, some are spenders. Some take risks while others are more conservative. If you've ever wondered why you and those you love don't see eye to eye on important financial matters, this workshop is for you.

May 5th : Beneficiary Roundup
When was the last time you reviewed the beneficiary designations on each of your accounts? Do you know the difference between per-stripes and per-capita designations? Has there been a life-changing event in your family such as a death, divorce, marriage or birth of a loved one? Do you recall who your named beneficiaries are on your 401(k), savings bonds, life insurance or annuities?

Monthly Event Marketing

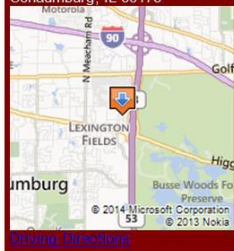
May Monthly Money Chat

When

Saturday May 11, 2013 from 10:00 AM to 12:00 PM CDT
[Add to Calendar](#)

Where

Starbuck's at The Streets of Woodfield
601 N. Martingale Avenue
Schaumburg, IL 60173



Dear Wendi,

Everyone talks about living authentically, telling the truth to others and themselves. What does it mean to live be authentic with money? What keeps us from getting the most out of our lives? What lies are we all telling ourselves about wealth?

In May, we welcome Ken Carlson of Authentic Development (<http://www.authenticdevelopment.com/>) lead an interactive workshop titled--"Authentically Wealthy"

Ken will teach us:

- The three lies that most of us tell ourselves about money
- The internal personal changes that each of us can do to embrace our own authenticity
- A highly resonant activity that you can do every day to increase the flow of wealth in your life

Ken is a leadership coach who started his business five years ago to help people Come Alive. Leadership starts with self-leadership, and well-being flows from that place.

Ken will also offer a special for individuals that want to connect their goals to their values. "Creating a Personal Mission Statement" is a 90

KEEP AS NEW REPLY REPLY ALL FORWARD ACTION DELETE SPAM

Evite Invitation: Sampleton Wealth Investment Book Club

Adam Sampleton to you [show details](#)

Adam Sampleton invited you to

Sampleton Wealth Investment Book Club

Thu, Apr 03, 2014 at 12:30 PM

WHERE:
123 Main Street
Conference Room
New York NY 10018

WILL YOU ATTEND?

YES MAYBE NO

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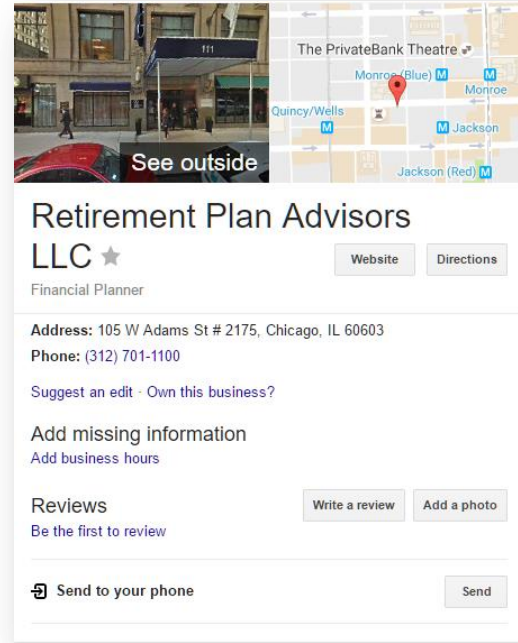
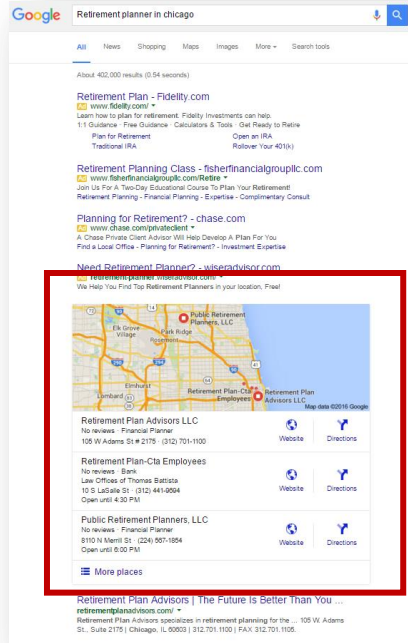
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4. Get Ranked



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Source: www.google.com/business

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71 results

Best Match

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Jody Pulliam-Altitude Invest 8418 N Knoxville, Peoria, IL (309) 682-1206 Open now

Peter Morfendorff - Ph 235 E Eastwing, East Peoria, IL (309) 699-6311 Open now

Financial Consulting Reso 8701 N Knoxville, Peoria, IL (309) 688-1020 Open now

Laf Financial 4403 N Knoxville, Peoria Heights, IL (309) 639-1897 Open now

IMG Financial Partner 2405 Nolan St East Peoria, IL (309) 594-2441 Open now

Edward Jones - Finanz 609 N Jackson St, Mokena, IL (309) 263-6771 Open now

Edward Jones - Finanz 1419 W Main St, East Peoria, IL (309) 444-7513 Open now

Edward Jones - Finanz 214 W Jefferson St, Mokena, IL (309) 266-7711 Open now

Knapp & Association L... 126 Eastgate Dr East Peoria, IL (309) 699-9106 Open now

Edward Jones - Finanz 517 N Parkside Dr, Peoria, IL (309) 345-3021 Open now

Edward Jones - Finanz 1704 Court St, Peoria, IL (309) 345-8097 Open now

Legacy Investments Service 430 N Main St, East Peoria, IL (309) 699-8885 Open now

Cypress Asset Management 4814 N Knoxville, Peoria Heights, IL (309) 679-9148 Open now

Knapp & Association Limited
Investment Service

126 Eastgate Dr, East Peoria, IL 61621
(309) 699-9100
www.knappandassociates.com

Directions

Details

About: Knapp & Assoc. Ltd is located in East Peoria, IL, and serves the surrounding communities in Central Illinois. After a lifetime of hard work, you should be able to do the things you've always wanted to do. This may be anything from traveling or spending a relaxing or relaxing retirement at an idyllic spot for you to do things you enjoy. You need to have a plan to help you with and that's where we can help. We will discuss your goals and help you receive the future for your retirement. Give us a call today to get you on the right track.

Categories: Legal & Financial Service, Investment Service, Investment Service

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Gary K Craig - Edward Jones Investments

Financial Advisor

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Your trust is our top concern, so businesses can't pay to alter or remove their reviews. Learn more

Paul P. Saint Louis, MO 4/15/2014
4.5 stars 4 reviews

My family and I have invested with Gary Craig since 2010. In a world of self-serving "professionals and advisors" or people who look out for their bottom line instead of yours, Mr. Craig is a pleasure to work with. The reasons I continue to invest with Mr. Craig are simple. He is honest and candid. Period. He takes time to explain things, conducts very thorough research, and works the hell out to make sure you understand every step of the

Yelp

YP financial advisors near Kansas City, KS

7. Foreman Jerrod SERVICES
701 Minnesota Ave, Kansas City, KS 66101
(913) 299-0068
Investment Advisory Service
Website Directions More info

8. Krum Jeff SERVICES
1600 Genessee St # 800, Kansas City, MO 64102
(816) 421-4343
Investment Advisory Service
Website Directions More info

9. Reliant Financial Services
1600 Genessee St Ste 965, Kansas City, MO 64102
(816) 421-7110
Investment Advisory Service
Website Directions More info

10. National Financial Data Service
430 W 7th St, Kansas City, MO 64105
(816) 435-1700
Investment Advisory Service
Directions More info

11. Cochran Head Vick & Co SERVICES
1333 Meadowlark Ln, Kansas City, KS 66102
(913) 287-4433
Financial Planning Consultants
Website Directions More info

12. Farm Bureau Financial Services SERVICES
2707 S 47th St, Kansas City, KS 66106
(913) 282-2333
Financial Planning Consultants, Insurance
Website Directions More info

Brian W Keeley
404 Shawnee St, Leavenworth, KS 66048
(913) 882-2325
Making Sense of Investing
Directions

Edward Jones - Financial Advisor: DeWayne Ovard
2300 Hutton Rd Suite 105, Kansas City, KS 66109
(913) 721-0327
Making Sense of Investing
Directions

Edward Jones - Financial Advisor: Eric V McTye
1847 Pawnee Pkwy, Kansas City, KS 66112
(913) 228-0829
Making Sense of Investing
Directions

Edward Jones - Financial Advisor: Joe Nash
419 Shawnee St, Leavenworth, KS 66048
(913) 882-2120
Making Sense of Investing
Website Directions

Edward Jones - Financial Advisor: Joel D Hadfield
871 W Eisenhower Rd Ste F, Lansing, KS 66043
Directions

Yellow Pages

5. Deliver Tools




Checklists, Worksheets, Reference

Rollover Ready Checklist

There are very specific steps to take in deciding what to do with your retirement savings. To help you think through the options, review these action items that cover all the basics of rolling over your assets and getting your savings ready for retirement.

Teresa S. Sampleton, CFP®, CLU, ChFC
Vice President
Sampleton Wealth Management Group
123 Main Street
12th Floor
New York, NY 10018
(212) 555-1111
tsampleton@sampletonwealth.com
www.sampletonwealth.com



1. I know what I want to do with this money

Yes	Notes
<input type="checkbox"/>	Fund retirement
<input type="checkbox"/>	Start a business
<input type="checkbox"/>	Make a big lifestyle change
<input type="checkbox"/>	Leave an inheritance
<input type="checkbox"/>	Give to charity

2. Choose your distribution option

<input type="checkbox"/>	Rollover to traditional IRA
<input type="checkbox"/>	Convert to Roth
<input type="checkbox"/>	Cash out
<input type="checkbox"/>	Leave in employ

3. List all retirement

<input type="checkbox"/>	Account #1 \$
--------------------------	---------------

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Retirement Budget Worksheet

Retirement Income Sources	Monthly	Annual
Social Security	\$	\$
Work Earnings	\$	\$
Company Pension	\$	\$
401(k) Plan	\$	\$
Retirement Accounts	\$	\$
Taxable Investment Accounts	\$	\$
Annuity	\$	\$
Rental Income	\$	\$
Business Interests	\$	\$
Other	\$	\$

Taxes	Monthly	Annual
Income Tax	\$	\$
Property Tax	\$	\$
Capital Gains Tax	\$	\$
Business/Corporate Taxes	\$	\$
Other	\$	\$

Household Expenses	Monthly	Annual
Rent	\$	\$
HOA Fees	\$	\$
Homeowners/Rental Insurance	\$	\$
Home Maintenance/Repairs	\$	\$
Home Improvements	\$	\$
Security System	\$	\$
Home appliances	\$	\$
Furniture	\$	\$
Other	\$	\$

Utilities	Monthly
Electricity	\$

Key Tax Changes

From the Tax Cuts and Jobs Act

Teresa S. Sampleton, CFP®, CLU, ChFC
Vice President
Sampleton Wealth Management
123 Main Street
12th Floor
New York, NY 10018
(212) 555-1111
tsampleton@sampletonwealth.com
www.sampletonwealth.com



Sampleton Wealth Management Group

Topic	New Law	Old Law	Comments
Retirement Savings
Charitable Deductions
Capital Gains Tax
Dividend Tax
Retirement Withdrawals
Health Insurance
Charitable Deductions
Capital Gains Tax
Dividend Tax
Retirement Withdrawals
Health Insurance

21 Key Stats for Tracking Your Financial Health

Knowing your numbers helps you stay healthy, wise and wealthy.

Teresa Sampleton, President
Sampleton Wealth Management
www.sampletonwealth.com



11 Biggest Rollover Blunders (and How to Avoid Them)



Rolling over your funds for retirement presents a number of opportunities for error. Having a set of guidelines and preventive touch points is necessary to save yourself from crucial (and often expensive) mistakes.

Here, we'll walk through 11 of the most common blunders associated with rolling over. Technical or merely anecdotal, exhibited by individuals or financial institutions, these examples all have the potential to cost you money. They're also easily avoidable.

A SPECIAL RETIREMENT REPORT

By Teresa Sampleton, CFP®

Director of Retirement and Life Planning, Horowitz LLC

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KEY FINANCIAL DATA 2018

Teresa S. Sampleton, CFP®, CPA
Sampleton Wealth Management

123 Main Street
12th Floor
New York, NY 10018
(212) 555-1111
tsampleton@sampletonwealth.com
www.sampletonwealth.com



Sampleton Wealth Management Group

Client Information	Personal Information	Investment Information	Other Information
Client Name: [Name]	DOB: [Date]	Investment Type: [Type]	Other: [Info]
Address: [Address]	Phone: [Phone]	Current Holdings: [List]	Notes: [Notes]
Employer: [Employer]	Spouse: [Spouse]	Future Projections: [Chart]	Disclaimer: [Disclaimer]
Retirement Accounts: [List]	Charitable: [Info]	Summary: [Summary]	Footer: [Footer]

Financial Services Tools

JAMES B. KRUZAN ABOUT JAMES

FREE RETIREMENT READINESS KIT

CLICK HERE to see what's included.

Where Would You Like It Sent?

Learn How To Get The Most From Your Retirement Savings

First Name*:

Last Name*:

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E-Mail*:

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As featured in:

6. Ask Your Clients



The Survey Effect

KEY VALUE DRIVER: FORMALLY ASK FOR FEEDBACK	REVENUE PER PRINCIPAL	INCREASE IN REVENUE
No	\$475,242	—
Yes	\$622,280	31%

Source: Cetera "What Do Clients Really Think?"

Survey Results

Customer Satisfaction Survey Template

Exit this Survey

1. How Am I Doing As Your Advisor?

Please read each question carefully. Check the box that best corresponds to your degree of satisfaction in that service area. You can only check one response per statement.

1. Are your phone calls and emails returned in a timely manner?

- Very timely
 Somewhat timely
 OK
 Not timely

2. Do we communicate with you enough?

- Very communicative
 Moderately communicative
 OK
 Not enough

3. How well do we understand your goals and what you want to accomplish?

- Very well
 Moderately well
 OK
 It's a struggle

4. Do you find the firm's website helpful?

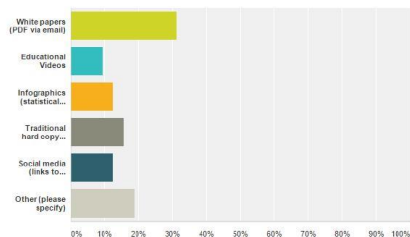
- Very helpful
 Moderately helpful
 OK
 Not helpful

5. How helpful is the staff?

- Very helpful
 Somewhat helpful

What method of material & resources are most valuable to you?

Answered: 32 Skipped: 1



Answer Choices	Responses
White papers (PDF via email)	31.25% 10
Educational Videos	9.38% 3
Infographics (statistically rich charts & graphics)	12.50% 4
Traditional hard copy material	16.63% 5
Social media (links to relevant articles & news)	12.50% 4
Other (please specify)	18.75% 6
Total	Responses 32

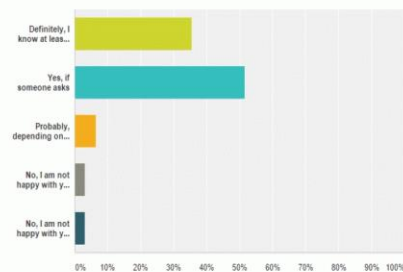
Showing 6 responses

Hard copy of annual progress toward goals &/or revised recommendations.
3/1/2015 7:28 PM [View respondent's answers](#)

Hard copy of annual progress toward goals &/or revised recommendations.
3/1/2015 7:25 PM [View respondent's answers](#)

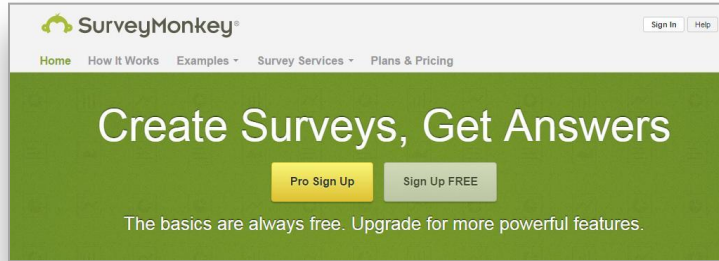
Would you recommend me to a friend or family member?

Answered: 31 Skipped: 2



Answer Choices	Responses
Definitely, I know at least one person I can refer	35.48% 11
Yes, if someone asks	51.61% 16
Probably, depending on what service they need	6.46% 2
No, I am not happy with your service or results	3.23% 1
No, I am not happy with your price	3.23% 1
Total	31

Online Survey Resources



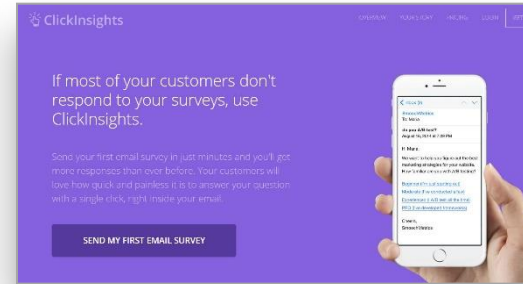
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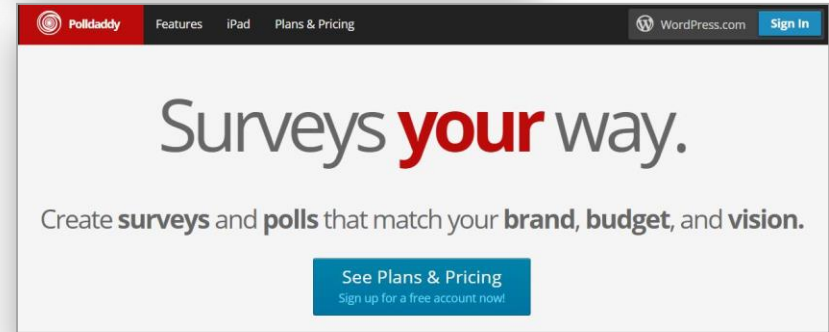
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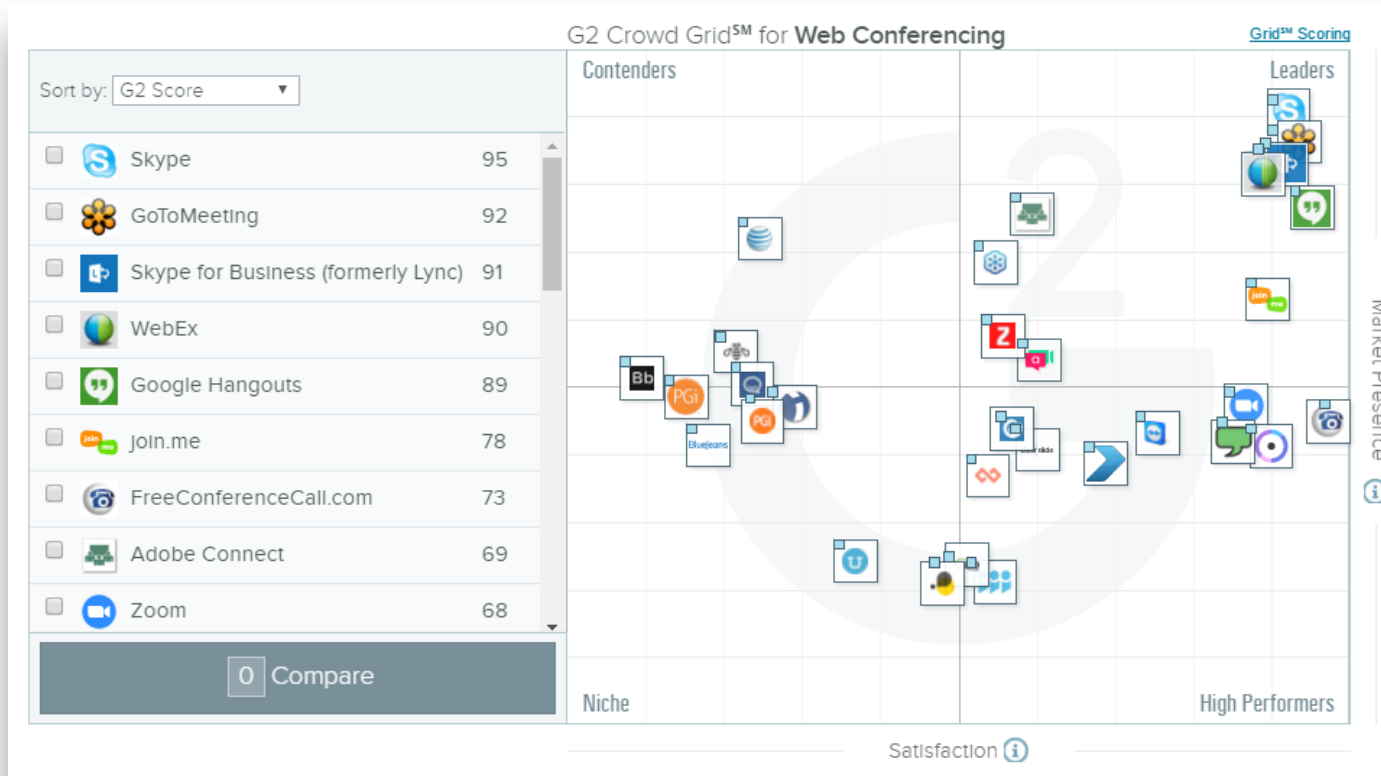
Create **surveys** and **polls** that match your **brand, budget, and vision.**

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Sign up for a free account now!

7. Host a Webinar



Find a Webinar Service



Source: G2crowd.com

Stream It Live

 **David Koch** 
May 18 · 

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Hey gang, I'll be hosting a [live Facebook](#) event at 1pm today to answer your [financial](#) questions.

From budgeting and goal setting, to ditching debt and growing and protecting your wealth, I'll be covering simple strategies to help you manage your money more effectively. Leave your questions in comments below.



 29  7 Comments

 Like  Comment  Share



Clarissa:
How can I
fund my
financial
planning firm?



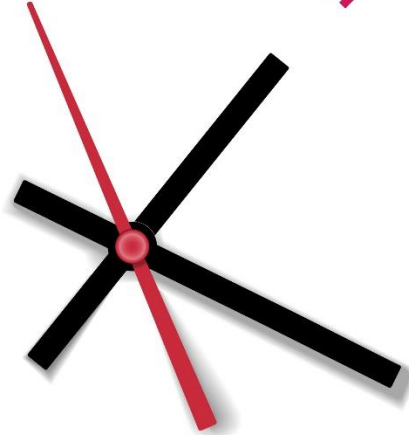
    



8. Be Urgent!



time for **action**



Year-End Planning



YOUR 2017



LAST-CHANCE



FINANCIAL PLANNING



CHECKLIST

Teresa A. San
Vice President
Sampleton Wealth Management Group
123 Main Street
New York, NY 10018
12th Floor
New York, NY
888-336-6884
tsampleton@sampletonwealth.com
www.sampletonwealth.com

Teresa S. Sampleton, CFP®, CLU, ChFC
Vice President
Sampleton Wealth Management Group
123 Main Street
New York, NY 10018
(212) 555-1111
tsampleton@sampletonwealth.com
www.sampletonwealth.com



SHAPE UP YOUR PERSONAL FINANCES FOR A GREAT YEAR-END!

Fall is an ideal time to examine your financial health and update your financial plans. Here is a list of important things to review that might make a difference in your year-end review and plans for next year. Check all that apply. If you have any questions or concerns, I will be happy to go over these items with you and discuss possible scenarios for 2017 and 2018. **Call to schedule a review.**

Check the box next to any key item that impacts your situation or needs more research or discussion.

1 TAXES

- Project income for 2017 & 2018.
- Project 2017 net investment income.
- Review realized and unrealized gains and losses.
- Collect cost-basis information on sold securities.
- Review sales of appreciated property like real estate and art.
- Check loss carry-forwards from last year
- Review potential deductions & credits for 2017.
- Track donations to charity.
- Review any gifting plans.

2 RETIREMENT

- Max out 401(k) contributions including catch-ups.
- Max out IRA contributions including catch-ups
- Analyze Roth IRA conversion scenarios: Full vs. partial vvs. none.
- Take required minimum distributions.
- Open a retirement plan if newly self-employed.
- Check status of all retirement accounts.
- Consider Social Security claiming options.

3 INVESTMENTS

- Confirm investment goals and strategy.
- Review asset allocation for rebalancing opportunities.
- Review fundamentals of portfolio positions.
- Revisit income and savings needs.
- Re-examine asset location.
- Review outstanding loans and mortgages.
- Review dividend distributions.
- Review employee stock options.

4 INSURANCE

- Review property and casualty policies.
- Review costs of current insurance policies.
- Review health insurance coverage.
- Identify material changes in life, business, or financial circumstances that may require insurance adjustments.

5 MILESTONES


- 50: Now you can make catch-up contributions to IRAs and some qualified retirement plans.
- 55: You can take distributions from 401(k) plans without penalty if retired.
- 59½: You can take distributions from IRAs without penalty.
- 62-70: You can apply for Social Security benefits.
- 65: You can apply for Medicare.
- 70½: You must begin taking RMDs from IRAs.

6 HEALTH

- Review employer's health insurance plan.
- Shop state health insurance exchange.
- Review Health Savings Account contributions for 2017.
- Spend any remaining balances in Flexible Spending Accounts.
- Review Medicare enrollment options.

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Year-End Tax Management



Teresa A. Samperton, CFP®, CLU, ChFC
 Vice President
 Sampleton Wealth Management Group
 123 Main Street
 New York, NY 10018
 (212) 555-1234
 tsamperton@sampleton.com
 www.sampleton.com



Teresa A. Samperton, CFP®



Dear Tom:

Today, I'm sending you a very handy reference tool that may help you strategize your 2016 tax bill. It's called the Key Financial Data card and it can help you tremendously when you're estimating next year's taxes.

In the past, I've sent this card out at the beginning of the year, but now that many of us are subject to taxes like the 3.8% net investment income tax and others, it's becoming more important to review it in the fall while you still have time to make adjustments.

Of course, detailed if numbers I hope you might be family m
 Call me
 Sincerely,
Teri
 Terry
 Sam
 terry
 Adv
 Ser

KEY FINANCIAL DATA 2018

Teresa A. Samperton, CFP®, CFA
Sampleton Wealth Management

123 Main Street
12th Floor
New York, NY 10018
(212) 555-1234
tsamperton@sampleton.com
www.sampleton.com

Total Household Income			
Source	2016	2017	2018
Wages	100,000	100,000	100,000
Dividends	10,000	10,000	10,000
Interest	5,000	5,000	5,000
Capital Gains	15,000	15,000	15,000
Retirement	0	0	0
Other	0	0	0
Total	130,000	130,000	130,000

Estimated Taxable Income			
Source	2016	2017	2018
Wages	100,000	100,000	100,000
Dividends	10,000	10,000	10,000
Interest	5,000	5,000	5,000
Capital Gains	15,000	15,000	15,000
Retirement	0	0	0
Other	0	0	0
Total	130,000	130,000	130,000

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Source	2016	2017	2018
Wages	100,000	100,000	100,000
Dividends	10,000	10,000	10,000
Interest	5,000	5,000	5,000
Capital Gains	15,000	15,000	15,000
Retirement	0	0	0
Other	0	0	0
Total	130,000	130,000	130,000

Health Care & Other Deadlines

Medicare choices

Original Medicare or Medicare Advantage Plan?

- Original Medicare
 - Enroll in Medicare Parts A and B
 - Choose a standalone prescription drug plan and enroll in Part D
 - Choose a supplemental insurance policy (Medigap policy or employment/retirement insurance). Note: Only you turn 65, your employer or retiree insurance may work differently than it has in the past. It may be coordinated with Medicare. If you will be relating employer or retiree coverage after turning 65, check with your plan to find out what you need to do to maintain coverage and to find out how it works.
- Medicare Advantage plan
 - Enroll in Medicare Parts A and B
 - Drop for and enroll in a Medicare Advantage plan that includes drug coverage offered by a private insurer

Get help finding plans

- Use Medicare Plan Finder www.medicare.gov/plan-finder
- Identify lower-cost plans in your area
- Drop plans and Medigap insurers if using Original Medicare or Medicare Advantage plans
- Call insurers for more information
- Ask for a State Health Insurance Assistance Program (SHIP) counselor: www.shipcenter.org

How to enroll

- Visit www.medicare.gov. Click on "Apply for Medicare"
- Call the Social Security Administration, 800-772-1213

MSA contributions may no longer be made after enrollment in Medicare

*Plan if also offers a high-deductible plan. If you choose this option, you must pay your full Medicare-covered costs up to the deductible amount of \$2,400 in 2018 before your Medicare plan starts paying.

**After you make your initial enrollment and your yearly Part B deduction, the Medigap plan pays 100% of covered services for the rest of the calendar year.

***Plan pays 100% of the Part B deductible, except for a co-payment of up to \$25 for some office visits and up to a \$50 co-payment for emergency room visits that don't result in hospital admission.

****You have Original Medicare, and the amount of a third or other health plan provider is legally permitted to charge is higher than the Medicare-approved amount, you can't be forced to enroll for services charge.

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How Medicare works with other insurance

Who first	Who first	Who second
Are 65 or older and covered by a group health plan that covers 20 or more employees based on the current employment of you or your spouse	Group health plan	Medicare
Are 65 or older and covered by a group health plan that covers fewer than 20 employees based on the current employment of you or your spouse	Medicare (must be enrolled in Parts A and B)	Group health plan
Are over 65 and retired and take a retiree plan	Medicare (must be enrolled in Parts A and B)	Retiree plan
Are over 65 and on COBRA	Medicare (must be enrolled in Parts A and B)	COBRA
Are covered under TRICARE	Medicare (must be enrolled in Parts A and B)	TRICARE

Medigap insurance policies

Medigap benefits	Medigap	
	A	B
Part A coinsurance and hospital costs up to an additional 365 days after Medicare benefits end	Yes	Yes
Part B coinsurance or copayment	Yes	Yes
Excess charges (first 3 years)	Yes	Yes
Part A deductible	Yes	Yes
Part B deductible	No	Yes
First covering health care maintenance	No	Yes
Part B out-of-pocket	No	No
Part B excess charges**	No	Yes
Foreign travel expense (up to plan limits)	NA	NA
Out-of-pocket limit**	NA	NA

If you live in Massachusetts, Minnesota, or Wisconsin, Med

Health Care Quick Reference Guide

MEDICARE FOR INDIVIDUALS 65+

Medicare enrollment periods

To ensure no gaps in coverage, arrange for Medicare and supplemental insurance before existing coverage ends.

Initial enrollment period for Part A (hospital insurance)

Starts 3 months before 65th birthday, with coverage having effect the first day of the month in which you turn 65.

Special enrollment period for Parts A and B (for people who are working and covered by an employer group plan (AGE))

May coincide with initial or special enrollment period for Parts A and B. If you have creditable drug coverage through a retiree or employer plan, it is not necessary to enroll in Part D when you enroll in Parts A and B. However, if you lose that creditable coverage, you should enroll in Part D within each coverage gap or no more than 63 days later to avoid penalties.

Open enrollment period for Medigap policies

Starts the first of the month in which you turn 65 and lasts 6 months. During this time, Medigap insurers have to take any, regardless of health status. The ACA prohibits against denying people with pre-existing conditions from enrolling in Medigap insurance.

Annual open enrollment period for Medicare Advantage plans and drug plans: October 15 – December 7

Change drug plans or enroll in a new drug plan.

Change Medicare Advantage plans or enroll in a new plan.

Part B monthly premiums

MAOP Single	MAOP Joint	MAOP Married filing separately	Part B monthly	Part B income-related premium	Part D income-related adjustment*
\$85.00	\$170.00	\$85.00	\$85.00		
\$107.00 - \$133.00	\$170.00 - \$214.00	\$107.00 - \$133.00	\$107.00 - \$133.00		
\$133.00 - \$149.00	\$207.00 - \$230.00	\$133.00 - \$149.00	\$133.00		
> \$149.00	> \$302.00	> \$149.00	> \$149.00		

Part B Deductible (beginning of coverage)

Part A: 60 days of hospitalization	Part A: 90 days	Part B
\$193 per day	\$336 per day	\$170 per year
Deductible: \$400 per year	Deductible: \$400 per year	Deductible: \$400 per year

Part D

This is Medicare's basic drug design; your plan may be different.

References

- Medicare: Getting Started
- Medicare: Working Under Medicare Part A and Part B
- Understanding Medicare Part C & D Enrollment Periods
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part B
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part A
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part D
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part B
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part A
- Medicare and Health Insurance: You Need to Know These Dates
- How to Enroll in Medicare Part D
- Medicare and Health Insurance: You Need to Know These Dates

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**Teresa A. Sampleton, CFP, CPA
Sampleton Wealth Management**

123 Main Street
12th Floor
New York, NY 10018



(212) 555-1111 ext. 10
t.sampleton@sampletonwealth.com
www.sampletonwealth.com

Premiums and deductibles for 2018

Part A: No premium if eligible for Social Security as a worker, spouse, divorced spouse, or surviving spouse

Part B monthly premiums

MAOP Single	MAOP Joint	MAOP Married filing separately	Part B monthly	Part B income-related premium	Part D income-related adjustment*
\$85.00	\$170.00	\$85.00	\$85.00		
\$107.00 - \$133.00	\$170.00 - \$214.00	\$107.00 - \$133.00	\$107.00 - \$133.00		
\$133.00 - \$149.00	\$207.00 - \$230.00	\$133.00 - \$149.00	\$133.00		
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Part D

This is Medicare's basic drug design; your plan may be different.

KEY PLANNING & INVESTMENT DEADLINES FALL 2016

OCTOBER FOCUS: Retirement Planning

October 10. Columbus Day (markets open)

October 15. Medicare health insurance open enrollment begins

October 17, 2015 extended individual tax returns due

NOVEMBER FOCUS: Year-End Planning

November 11. Veterans Day (markets open)

November 24. Thanksgiving Day (markets closed)

November 25. Markets close at 1 p.m. ET

DECEMBER FOCUS: Charitable Giving

December 7. Medicare open enrollment period closes

December 26. Christmas Day observed (markets closed)

December 31. Last day to:

- Establish Keogh, solo 401(k)
- Make contributions to 401(k)
- Set stock to realize gains/losses
- Take RMDs
- Pay expenses for itemized deductions
- Make tax-deductible charitable contributions
- Make annual tax-free gifts

**Teresa S. Sampleton, CFP®, CLU, ChFC, CLTC Vice President
Sampleton Wealth Management Group**

123 Main Street 12th Floor
New York, NY 10018
(212) 555-1111 ext. 10



FINANCIAL DATES & DEADLINES

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NOVEMBER 11. Veterans Day (markets open)

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- Take RMDs
- Pay expenses for itemized deductions
- Make tax-deductible charitable contributions
- Make annual tax-free gifts

SPECIAL OBSERVANCES

Cybersecurity Awareness Month
October 3-9. Financial Planning Week
October 12. Take Your Parents to Lunch Day
October 16-22. Save for Retirement Week
October 17-23. Estate Planning Week

Long-Term Care Awareness Month
November 6. Daylight Savings Time ends
November 8. Election Day
November 26. Small Business Saturday

December 7. Pearl Harbor Day
December 16. Wreaths Across America Day
December 16. Ugly Christmas Sweater Day
December 24-Jan. 1. Hanukkah
December 25. Christmas Day
December 30. Bacon Day
December 31. New Year's Eve

Time for a review of your retirement plan?

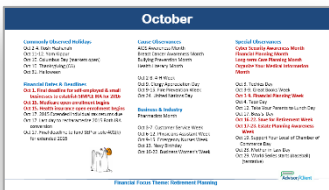
Don't forget to vote!

Happy Holidays! Have a Great New Year!

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US! (314) 569-2400

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Year-End Marketing Ideas



Celebrate a Date



Host a Webinar



Deliver Tools



Get Ranked



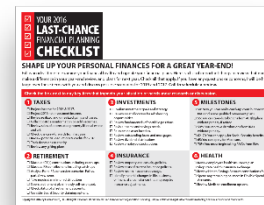
Ask Your Clients



Show Them All You Do



Break Bread – Regularly

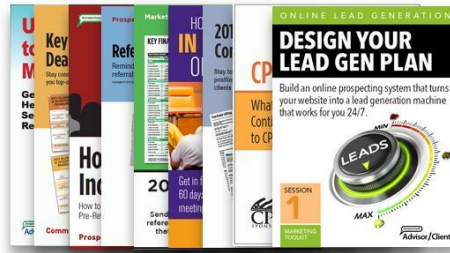


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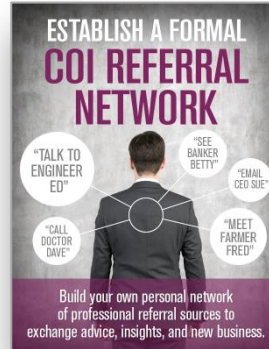
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Sept 18



Sept 25

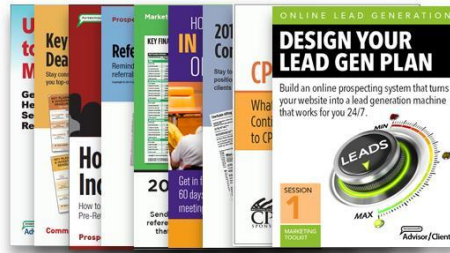


Oct 4

End the Year Well!

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