

LET'S DO THIS TOGETHER!



A bit of  
*advice*  
could empower  
your financial  
future

**LEGACY PLANNING GROUP**

Building & Preserving Wealth

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YOUR PERSONAL INVITATION IS ENCLOSED!



**LEGACY PLANNING GROUP**

Building & Preserving Wealth

**WHO IS LEGACY PLANNING GROUP?** Locally owned and operated independent planning professionals, Legacy Planning Group, provides our clients with independent advice and personalized retirement planning focusing on "Building And Preserving Wealth."

**JOIN US FOR A FREE LUNCH OR DINNER!**

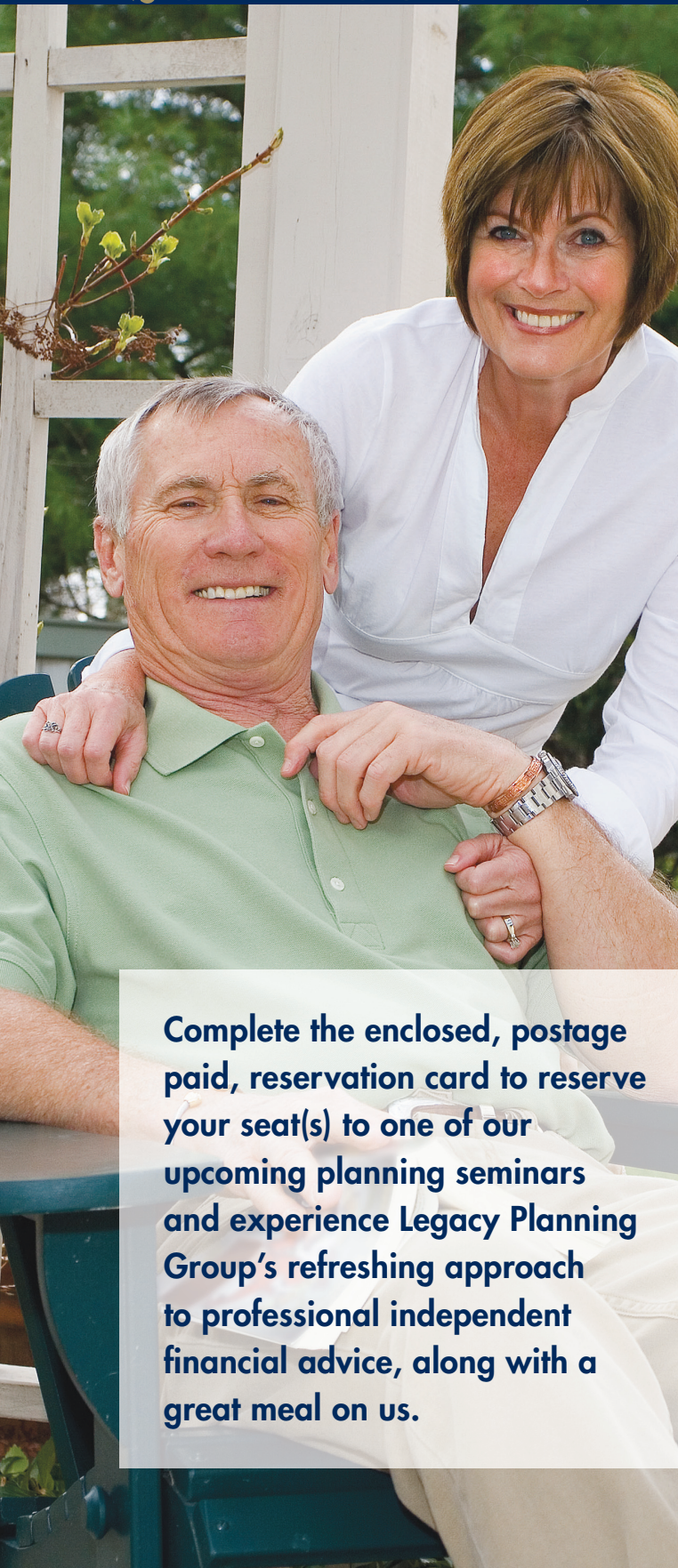
Complete the enclosed invitation to attend an informative Retirement & Estate Planning Seminar about "Building, Preserving & Passing Wealth."

*More details inside!*



YOUR PERSONAL INVITATION IS ENCLOSED!

# ENJOY A COMPLIMENTARY LUNCH OR DINNER!



**Complete the enclosed, postage paid, reservation card to reserve your seat(s) to one of our upcoming planning seminars and experience Legacy Planning Group's refreshing approach to professional independent financial advice, along with a great meal on us.**

**Legacy Planning Group** pays particular attention to the concerns that are of the most importance to people, combining them into a clear and concise educational seminar. Please join us and enjoy a complimentary lunch or dinner, while you learn more about the following topics:

- » Record Keeping Solutions to Simplify Your Life
- » Identity Theft – How to Protect Yourself
- » Low Interest Rates/Rising Interest Rates
- » 1031 Exchanges\*
- » Estate & Tax Planning
- » Roth IRA Conversion Opportunities
- » IRA Rollover Alternatives
- » Understanding Annuities
- » Measuring Portfolio Risk
- » Stock Market Outlook
- » Keys to Understanding Investment Strategy

The topics covered will give you new insights into proper planning prior to, or during, your retirement years. If you have been concerned about any of the above topics, attending this seminar is a must. Our educational seminars are designed to be clear, concise and easy to understand. We are committed to offering the most comprehensive list of topics and seminar locations than any local planning firm.

\* 1031 Exchange Investors must have \$1 Million New Worth, or income exceeding \$200,000 per year for an individual for the past 2 years and \$300,000 per couple for the same time period.

Investment Advisory Services offered through Legacy Planning Group Inc., a Registered Investment Advisor.

Securities offered through H. Beck, Inc., member FINRA/SIPC. Legacy Planning Group, Inc. and H. Beck, Inc. are unaffiliated.

## SEMINAR RESERVATION CARD\*\* – FILL OUT, DETACH AND RETURN

Name \_\_\_\_\_ # of Reservations \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

E-mail (optional) \_\_\_\_\_

**YES!!** Please reserve my seat(s) for the **COMPLIMENTARY LUNCH OR DINNER** presentation for the date marked below:

I am unable to attend. Please call me to schedule a time for me to receive a FREE information kit and a **DINNER GIFT CERTIFICATE**.

## SPECIAL OFFER!

*Attendees will learn how to receive our Complimentary "Personal Document Organizing Kit"*

\*\* Reservations are required; please RSVP by returning this postage paid invitation, or contact Dave or Angela at 801-207-1400 or toll free at 1-866-282-1400.

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