

Marketing Materials

Each seminar includes a coordinated marketing campaign that contains the following components:



Flyer



Invite



2 Page Letter



Postcard

Scroll this document to see all marketing campaign components.

You could lose out on thousands of dollars in Social Security benefits by making an uninformed choice.



One of the most important decisions you need to make before you retire is when to claim Social Security benefits. Many retirees apply for Social Security before reaching full retirement age. But by doing so, they may significantly and permanently reduce the benefits that they — and possibly their spouses — could receive over a lifetime.

Social Security provides not only a guaranteed income stream but also **longevity protection, spousal protection,** and some **inflation protection.** It may be the closest thing you receive to a traditional pension.

Do you understand the various claiming strategies that could enhance your income?

Whether you're single, married, divorced, or widowed, there may be ways to maximize the lifetime Social Security benefits you receive. Join us for an educational workshop where we'll focus on:

- **Changes to Social Security filing strategies**
- **How married couples can help enhance their combined monthly and lifetime benefits**
- **How the “do over” and “start, stop, restart” strategies work**
- **How to claim retroactive benefits as a lump sum**
- **The effect of remarriage on survivor benefits for widowed and divorced spouses**
- **Five factors that could reduce the actual payments you receive**

When you attend the workshop, you will receive a 20-page, information-packed financial workbook with essential information from the workshop. Perhaps best of all, you'll be eligible for the complimentary consultation offered to all workshop participants.

Making the Most of Social Security ***Retirement Income-Enhancing Strategies***

sponsored by

(YOUR COMPANY'S NAME)

(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

will be held on

(DAY, DATE)

from (TIME) to (TIME)

at (LOCATION).

Reserve your seat and your full-color workbook today!

Call (YOUR PHONE NUMBER).

(place any necessary disclosure here)

Preview

Making the Most of Social Security

*You could lose out on thousands of dollars in
benefits by making an uninformed choice.*



One of the most important decisions you need to make before you retire is when to claim Social Security benefits.

Many retirees apply for Social Security before reaching full retirement age. But by doing so, they may significantly and permanently reduce the benefits that they — and possibly their spouses — could receive over a lifetime.

Whether you are single, married, divorced, or widowed, there may be ways to maximize the lifetime Social Security benefits you receive.

Join us for an educational workshop where we'll focus on Social Security, plus a lot more.

Preview

Making the Most of Social Security
Retirement Income-Enhancing Strategies

will be held on

(DAY, DATE)
(TIME) to (TIME)
(LOCATION)

To reserve your place, call

(PHONE NUMBER)
by (DATE).

(YOUR FIRM'S NAME)

(YOUR COMPANY'S NAME OR LOGO)
(BRANCH OR OSJ ADDRESS, IF APPLICABLE)

Making the Most of Social Security Retirement Income-Enhancing Strategies

(DATE)

(NAME)
(STREET ADDRESS)
(CITY, STATE, ZIP)

Dear (NAME):

One of the most important decisions you need to make before you retire is when to claim Social Security benefits. Many retirees apply for Social Security before reaching full retirement age. But by doing so, they may significantly and permanently reduce the benefits that they — and possibly their spouses — could receive over a lifetime.

Social Security provides not only a guaranteed income stream but also **longevity protection, spousal protection**, and even some **inflation protection**. It may be the closest thing you receive to a traditional pension.

***Do you understand the various claiming strategies
that could enhance your income?***

Whether you're single, married, divorced, or widowed, there may be ways to maximize the lifetime Social Security benefits you receive. It's important to have a good understanding of these issues:

- **Changes to Social Security filing strategies**
- **How married couples can help enhance their combined monthly and lifetime benefits**
- **How the “do over” and “start, stop, restart” strategies work**
- **How to claim retroactive benefits as a lump sum**
- **The effect of remarriage on survivor benefits for widowed and divorced spouses**
- **Five factors that could reduce the actual payments you receive**

(continued on back)

Please join us at my ***Making the Most of Social Security*** workshop on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). This educational presentation is sponsored by (YOUR FIRM'S NAME). When you attend, you will receive a 20-page, information-packed workbook that is filled with important information you will want to remember from the presentation.

The workshop is enhanced with colorful graphics highlighting the latest facts and figures, and you'll find it to be a brief and easy-to-understand presentation. In only about an hour, we will address how making sound decisions.

Here are some of the key reasons why you should attend:

- **Acquire sound information**
- **Avoid costly mistakes**
- **Benefit from sound guidance**
- **Focus on ways to enhance the benefits you receive**

Perhaps best of all, to help you make the most of your workshop experience, I'll be offering a complimentary consultation to everyone who attends the workshop. This follow-up meeting is a great way to evaluate your options and to discuss questions you may have after the workshop.

I hope you can take advantage of this excellent educational opportunity. You are welcome to bring a friend to the workshop. Seating is limited, however, so call (YOUR PHONE NUMBER) today to reserve your place and your workbook.

Sincerely,

(YOUR NAME)
(YOUR TITLE)

Making the Most of
Social Security

*You could lose out on thousands of dollars in benefits
by making an uninformed choice.*



One of the most important decisions you need to make before you retire is when to claim Social Security benefits. Many retirees apply for Social Security before reaching full retirement age. But by doing so, they may significantly and permanently reduce the benefits that they — and possibly their spouses — could receive over a lifetime.

Whether you're single, married, divorced, or widowed, there may be ways to maximize the lifetime benefits you receive.

Join us for an educational workshop where we'll focus on strategies that may help you determine the best age to claim benefits, understand the various claiming strategies, and learn how married couples could enhance their combined monthly and lifetime benefits.

Making the Most of Social Security ***Retirement Income-Enhancing Strategies***

(DAY, DATE)

(TIME)

(LOCATION)

Call (YOUR COMPANY'S NAME)
at (PHONE NUMBER) to register.