

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.

Have market events reshaped your financial future?

Discover sound financial strategies to help strengthen your portfolio

We've certainly had our share of market volatility lately. But the fact remains that asset bubbles, debt crises, political uncertainty, currency swings, international conflicts, and economic conditions — in the United States and abroad — can spur volatility in the financial markets. And often it's a case of *when* and not *if* it happens.

It's only natural to be concerned when the market drops. And yet, even during turbulent times, you can more comfortably ride out a financial storm *if* you're prepared and have sound financial strategies in place.

Come to our educational workshop and discover methods that could enhance your investing potential in today's markets. By using sound investment approaches, you might avoid making emotion-based mistakes during times of volatility.

There is no fee for the workshop, and you'll receive a full-color, 20-page workbook packed with information that will help you take a good look at your personal situation and evaluate your options.

Surviving Market Swings

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).

All investing involves risk, including the possible loss of principal. There can be no guarantee that any investing approach will be successful.

Mutual funds and exchange-traded funds are sold by prospectus. Please consider the investment objectives, risks, charges, and expenses carefully before investing. The prospectus, which contains this and other information about the investment company, can be obtained from your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

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Preview

Have market events reshaped your financial future?

**Discover strategies
to help strengthen
your portfolio at our
upcoming seminar**



You're invited to an educational workshop on
investing in today's markets.

Out of uncertainty can come opportunity.
Even during times of volatility, you can more comfortably
ride out a financial storm *if* you have a sound
financial strategy — if you're prepared.

Preview

Surviving Market Swings Investment Strategies for Uncertain Markets

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)

Have market events reshaped your financial future?

(DATE)

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

Dear (NAME):

We've certainly had our share of market volatility lately. But the fact remains that asset bubbles, debt crises, political uncertainty, currency swings, international conflicts, and economic conditions — in the United States and abroad — can spur volatility in the financial markets. And often it's a case of *when* and not *if* it happens.

It's only natural to be concerned when the market drops. And yet, even during turbulent times, you can more comfortably ride out a financial storm *if* you're prepared and have sound financial strategies in place.

Our political and financial leaders are confident in our economy's long-term ability to rebound from crises.¹ There are still opportunities but many pitfalls to avoid. And those who understand how to position themselves financially won't merely survive — they have the potential to thrive.

I am presenting an educational workshop, *Surviving Market Swings: Investment Strategies for Uncertain Markets*, on (DAY, DATE) from (TIME) to (TIME) at (LOCATION). There is no cost to attend this workshop and there is no obligation. It is a presentation sponsored by my firm, (YOUR FIRM'S NAME), and no products or services will be offered for sale during the event.

Just for attending the workshop, you will receive a FREE workbook on sound investment strategies to position your portfolio for the future. This 20-page resource is packed with information, exercises, and questions that will help you evaluate your current financial strategies — and, if necessary, help you develop new ones.

Continued on back

The workshop itself is an easy-to-follow presentation with colorful graphics that highlight the latest facts and figures. In about an hour, we'll focus on:

- **How recent events have influenced stocks**
- **Challenges facing the economy and the markets**
- **Developing a sound financial strategy**
- **Choosing core investment vehicles to add diversification to your portfolio**
- **Understanding investment taxation, including capital gains and losses**
- **Using fundamental tactics to enhance your investing potential**
- **Overcoming risky behavior**
- **Keeping expectations in check and preparing for the unexpected**

As a follow-up to the workshop, you will be offered a complimentary consultation to discuss your specific situation. This follow-up meeting is a great way to evaluate your options and get answers to your individual questions.

I hope you can take advantage of this excellent opportunity. You are welcome to bring a guest, but seating is limited, so call (YOUR PHONE NUMBER) today to reserve your place and your workbook.

Sincerely,

(YOUR NAME)
(YOUR TITLE)

Source 1) Board of Governors of the Federal Reserve System, 2015

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Have market events reshaped your financial future?

Discover strategies
to help strengthen
your portfolio

Preview

We've certainly had our share of market volatility lately, but out of uncertainty can come opportunity. Please join us for an educational workshop where you'll discover sound strategies to help you strengthen your portfolio and avoid making emotion-based mistakes.

Surviving Market Swings

Investment Strategies for Uncertain Markets

(DAY, DATE)

(TIME)

(LOCATION)

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

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(place any necessary disclosure here)