

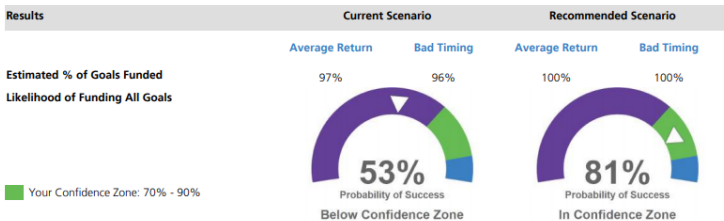
A TRANSFORMATIVE DIGITAL APPROACH TO FINANCIAL PLANNING



MoneyGuidePro® is a revolutionary platform which allows you to view your financial future and help tackle the 'what if's' in life. The client experience includes:

- Identifying and inventorying your current financial situation with our **Present Condition Analysis (PCA)**
- Defining your financial goals and the funding needed to make them a reality
- Customization of a retirement plan that includes both accumulation and income distribution strategies, social security planning tips, and more
- Guidance in becoming more knowledgeable, confident, and in control of your financial future
- Step by step action items to bring your financial plan into the "confidence zone"

A SAMPLE VIEW



| | Current Scenario | Pension Scenario | Changes In Value |
|-----------------------|------------------|------------------|------------------|
| Retirement | | | |
| Retirement Age | | | |
| Anthony | 65 in 2025 | 65 in 2025 | |
| Denise | 61 in 2023 | 61 in 2023 | |
| Planning Age | | | |
| Anthony | 91 in 2051 | 91 in 2051 | |
| Denise | 93 in 2055 | 93 in 2055 | |

Learn more about this complimentary platform by contacting:

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Or, send this back in your tax organizer packet with the following information, and we will reach out to you:

Name _____ Email _____ Phone _____