



Events

Whether you are still working and need to develop or improve your retirement plan, or you're already retired but want to protect and optimize your financial situation we would love to teach you at one of our upcoming workshops. Bill Romeo, your speaker is well known in the Matthews area for explaining concepts in plain and easy language that everyone can understand. And... we don't mind if you need a refresher course too!

HAVE A QUESTION?

Name

Email

Question

August 27, 2015
7:00p - 9:00p

SAVVY IRA PLANNING

American Prosperity
Group Education
Classroom

[REGISTER](#)

Retirement planning can be an overwhelming process and Baby Boomers are asking: This workshop will cover: What do I do with my retirement money when I leave my job and what type of retirement account is right for me? Can I still contribute to my retirement account and if so, how much? When do I need to take withdrawals and how much do I have to take? How does my IRA fit into my overall plan? When to roll over an IRA; convert my funds to a ROTH IRA and why to consider an in-plan ROTH conversion?

[SUBMIT](#)

September 10, 2015
7:00p - 9:00p

WOMEN AND INVESTING

American Prosperity
Group Education
Classroom

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Empowering Women to take steps today to be prepared for tomorrow. Discussions Will Include: Thriving During Life's Transitions and Challenges, Planning For Retirement and Healthcare Costs, and Leaving a Legacy For Future Generations.

September 16, 2015
7:00p - 9:00p

MAXIMIZING YOUR SOCIAL SECURITY BENEFITS

American Prosperity
Group Education
Classroom

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Will Social Security be there for me? How much can I expect to receive? When should I apply for Social Security? How can I maximize my benefits? Will Social Security be enough to live on in retirement? After being told for years that Social Security is "going broke," baby boomers are realizing that it will soon be their turn to collect. This informative seminar covers the basics of Social Security and reveals strategies for maximizing your benefits. You will learn the five factors to consider in deciding when to apply for benefits; innovative strategies for coordinating benefits with your spouse; how to coordinate benefits with other sources of income; how to minimize taxes on Social Security benefits; special rules on benefits for divorced spouses and survivors; and more. The decisions you make now can have a tremendous impact on the total amount of benefits you stand to receive over your lifetime.

September 22,

SAVVY MEDICARE PLANNING

2015

7:00p - 9:00p

Educational
Classroom

REGISTER

Come and learn the basics of applying for Medicare coverage. This educational presentation will address common questions and concerns about Medicare such as costs, coverage, differences in the parts (A, B, C, and D) Advantage Plans and Supplement Plans. Course designed as an overview for those who want to learn more to help ease the confusion.

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