

BAGELS WITH A BROKER



Hosted by:

Ben Baertschy

Financial Advisor
Edward Jones
MAKING SENSE OF INVESTING

**NEW
FORMAT!**

NEW FORMAT! Featured speaker each month

Have a bagel and chat with Ben Baertschy, Financial Advisor with Edward Jones, on the **1st Monday of each month at 9 a.m.** Ben will be joined by a special guest speaker each month to address a specific investment topic.

JANUARY 7: Dave Hrea from Lord Abbott

Topic: How diversification and rebalancing can help navigate your portfolio through retirement

FEBRUARY 1: Nicole Pretzel from Oppenheimer

(Note date change: Due to a scheduling conflict, this meeting is on the 1st Friday, not the usual 1st Monday)

Topic: Benefits of dividend paying equity funds

MARCH 4: Kathleen Gill from Franklin Templeton

Topic: The current market and how stocks can compliment your portfolio

APRIL 1: Keith Brennan from Prudential

Topic: Ideas for increasing income and adding longevity to your income in retirement

MAY 6: John Florence from Lincoln Financial

Topic: Understanding your required minimum distributions

JUNE 3: Jim Lowry from Pacific Life

Topic: How to prepare for long-term care expenses

JULY 1: Robin King, CPA

Topic: New tax laws

AUGUST 5: Dave Hrea from Lord Abbott

Topic: Market update and how to rebalance and diversify your portfolio to weather stormy markets

SEPTEMBER 9: Derek Straaland of Lincoln Financial

Topic: Using insurance in your estate planning

OCTOBER 7: Jim Lowry from Pacific Life

Topic: Income in retirement

NOVEMBER 4: Phil Shepherd, Attorney

Topic: Estate Planning

DECEMBER 2: No guest speaker

Topic: Year end wrap up and ideas for next year

Bagels by "The Bagelmeister." Free to attend.

Pre-registration is appreciated by calling 322-3630
or stop at the front desk.

