



PLEASE JOIN US FOR LUNCH & A SEMINAR DESIGNED FOR POA RETRIEES

Tuesday - September 21, 2010 or Wednesday - September 29, 2010

11:30 a.m. @ the POA Office (Downstairs Meeting Room)

SEMINAR AGENDA:

LONG-TERM CARE INSURANCE

This is an area of concern for many retirees. POA Insurance Broker, Mark Meredith, will discuss the need for this product as well as how to design a program to fit most budgets.

MANAGING YOUR INVESTMENTS

Robert Duffy, Financial Planner and Retirement Planning Specialist, AXA Advisors, LLC, will introduce concepts that may be helpful in managing your retirement assets, including strategies for retirement accounts such as deferred compensation, 401(k) plans and IRA's.

LIFE INSURANCE AND ITS ROLE IN RETIREMENT

Financial Consultant and POA Insurance Broker Samantha Meredith Curtin, MBA, will discuss how this product can be leveraged to provide living benefits to the retiree as well as income benefits and a legacy to survivors.

Lunch will be served at 11:30 a.m.

**Please RSVP to Mark Meredith @ (949) 833-5845 by Friday - Sept. 17th
Spouses are welcome to attend!**