

**FROM:** [Jay Tillman, Security Retirement and Investment Services](#) located at [Security Credit Union](#)

**SUBJECT:** Virtual Financial Educational Workshops

Join an upcoming workshop from the comfort of your home or office where a variety of topics are discussed to increase your financial awareness. Financial education is an important aspect of any long-term plan.

Attend as many virtual workshops as you like. You'll learn the answers to questions, including:

- *The important rules of the road for receiving Social Security.*
- *How can conservative investments help you face today's economic risks?*
- *What sources of income should you draw from and when?*
- *How to use annuities to guarantee income for life.*
- *How does behavioral finance affect investment decision-making?*

**Upcoming workshops:**

*(The below content will be edited based on the new ones available)*

**Seminar Title**

|   |       |                 |                        |
|---|-------|-----------------|------------------------|
| <b>Rethinking Diversification</b>           | 08/16 | Time (6:00 EST) | <a href="#">(Link)</a> |
| <b>Social Security and your Retirement</b>  | 08/23 | Time (6:00 EST) | <a href="#">(Link)</a> |
| <b>Understanding Medicare</b>               | 08/30 | Time (6:30 EST) | <a href="#">(Link)</a> |
| <b>The Return of Conservative Investing</b> | 09/06 | Time (6:00 EST) | <a href="#">(Link)</a> |
| <b>Income for Life</b>                      | 09/13 | Time (6:00 EST) | <a href="#">(Link)</a> |
| <b>The 3 Transitions to Retirement</b>      | 09/29 | Time (6:00 EST) | <a href="#">(Link)</a> |

Space is limited, so I urge you to make your reservations today. Give me a call at **810-235-0261** or contact me by email at [j.tillman@lpl.com](mailto:j.tillman@lpl.com) with any questions about the virtual workshops.

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Fixed annuities are long-term investment vehicles designed for retirement purposes. Gains from tax-deferred investments are taxable as ordinary income upon withdrawal. Guarantees are based on the claims paying ability of the issuing company. Variable annuities are subject to risk, and may lose value.

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**This workshop is educational only and is not investment advice. If you need advice regarding your financial goals and investment needs, contact a financial advisor.**

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