

**This workshop is for informational purposes only.** There is no assurance that the techniques and strategies discussed are suitable for all investors or will yield positive outcomes. The purchase of certain securities may be required to affect some of the strategies. Investing involves risks including possible loss of principal. Insert Approved B/D Disclaimer & Contact Info.

**Mark Your Calendar**

**03 | 05 | 2020**

**Thursday @ 6pm**

**Dinner served**

 **We encourage you
to bring a friend.**

**Seating is limited.** Please RSVP to (123) 456-7890 to reserve your spots today.

**This workshop will review valuable information including:**

* timely and practical planning strategies for 2020
* how low interest rate environment can affect investors
* trade wars and the overall health of the global economy
* **Proactive** tax planning tips for 2020
* **How the new *SECURE ACT* changes retirement planning**

**This *Gold Medal Service* event is
for our clients and their guests.**

**2020 Outlook**

**Hosted By:**

**Your Name
Company**