



LIVE WORKSHOP:

Make Your **Events** an **Easy Yes**



Events: What Results Can you expect?

Over last 18-24 months:

- 1,000 people registered
- 40% attended
- 8-10% reached out

Results:

- Generated 9 new client households
- \$11 Million AUM
- \$12,000 ad spend

First webinar ONLY had 10 people on it!



 Tuesday, April 4, 2023 @ 12pm PT



5 Hidden Tax Strategies for Microsoft Employees



Presented by
Isaac Presley, CFA®
CEO, Cordant Wealth

- How to take advantage of recent tax changes
- 5 hidden strategies to help reduce your tax bill
- How to avoid common tax planning mistakes

Event ended

5 Hidden Tax Strategies for Microsoft Employees

Event by Cordant Wealth Partners

 Tue, Apr 4, 2023, 3:00 PM - 3:45 PM (your local time)

 Online

 Event link · https://us02web.zoom.us/webinar/register/WN_q3Ow2rOEQrWTigJFCdwKiA

 Isaac Presley and 136 other attendees

[Share](#) 

Source: <https://altruist.com/podcasts/the-unexpected-tool-that-led-to-millions-in-aum-with-isaac-presley/>

PREDICTION:

**AI is going to push us
to value events and
in-person experiences
even more**



Video made with Google's new VEO 3

01

The Psychology Behind “YES, I want to go to that event!”

START by focusing on CURRENT Pain Points – the MORE specific the better

Email Example



Susan, are you planning a summer event but seeing low attendance rates?

I've heard from so many advisors that they're either getting the same faces at every event – or struggling to break single-digit RSVPs

That's why I'm hosting a LIVE workshop this week, **June 12 at 10 am PT/1 pm ET** to help you turn your event into an easy YES!

You'll walk away with a proven system that's helped advisors boost their event attendance. I'm breaking down the 3 event formats that are consistently generating new business – and giving you the exact communication plan to keep it hassle-free.

You'll get:

🧠 **The Psychology Behind "YES":** why certain event formats make prospects want to attend.

📧 **Done-For-You Marketing Materials:** the exact email invitations, landing page copy and follow up sequences that have proven to work – just for signing up!

📁 **LIVE LinkedIn Tutorial:** how to set up an event page and use advanced filtering to find, invite, and meet new prospects (completely FREE!).

🔧 **FMG Events Tool Demo:** quick look at how our platform handles all the event logistics.

👉 [Join my workshop!](#)

Explicitly Explain The BENEFITS of Attending. What will they Get out of joining?

Susan, are you planning a summer event but seeing low attendance rates?

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👉 [Join my workshop!](#)

End with A Preview - A Video, Resource, Guide, Etc.

Here is a sneak peek of 4 event tips to make your event a success (and much more where that came from 😊):



Same Email, just
scrolled down to
the end! ➡

Hope to see you there!



Samantha Russell
Chief Evangelist

fmg

A Great Advisor Example:

This event lead to 2 new client relationships!

This is image was added to the “events” section of the from the advisors’ website.

TFG

Who We Are V



Principal Cetera TFG Tax & Financial Group

Please join us for:
Preparing for a Successful Succession

Topics will include:

- **Business succession planning** requires addressing financial, legal, and tax considerations and often involves a coordinated team of advisors to navigate complexities effectively.
- **Owner readiness is crucial**—many business owners struggle with questions like “Will I have enough money?”, “What is my business worth?”, and “What’s the best way to sell?”
- **Exit strategies** vary and may include intrafamily transfers, sales to key employees, or external buyers—each with unique challenges and opportunities.
- **Common issues** in business exits include unclear valuation, tax liabilities, leadership gaps, and emotional readiness.
- **Having the right team**—including legal, tax, and financial professionals—is essential for a smooth and successful transition out of the business.

With years of experience in the field, they will share invaluable insights and practical knowledge to empower attendees in making well-informed decisions.

Presented by:

 **Bradley R. Behrendt, CFP®, CPA**
Financial Advisor
Tax & Financial Group

 **Sean McCloskey, CPA, ABV®**
Chief Executive Officer
Tax & Financial Group

Warehouse 72
at The Hyatt Regency Irvine
17900 Jamboree Rd, Irvine, CA 92614

Thursday May 15th, 2025

5:30 PM

Bradley R. Behrendt, Financial Advisor (CA Insurance License No. 0D49596) & Sean McCloskey, Investment Advisor Representative (CA Insurance License No. 0G7816). Securities offered through Cetera Advisor Networks LLC (doing insurance business in CA as CFGAN Insurance Agency LLC, CA Insurance Lic# 0644376), member FINRA/SIPC. Advisory Services offered through Cetera Investment Advisers LLC, a registered investment adviser. Tax & Financial Group is

02

Event Ideas That are an Easy “Yes”

GIVEAWAY:

Summer Events Toolkit



Summer Events Toolkit

Summer is the perfect season to strengthen connections and create lasting impressions. This toolkit provides everything you need to execute three engaging events that will establish you as a trusted expert, connect with family members and deliver personal value to your clients (and prospects!).



Each toolkit is from our “Do It For Me” Program and includes:

- **Event Overview** - Complete event concept and execution guide
- **Planning Checklist** - Step-by-step timeline to keep you organized
- **Promotion Copy** - Ready-to-use marketing materials and messaging
- **Landing Page Copy** - Professional registration page content (PRO TIP: FMG’s platform automates and collects RSVPs for you!)
- **Event Collateral + Talking Points** - Presentation materials and speaker notes

Event Toolkits

1. Family Summer Event with Photographer

Create lasting memories while positioning yourself as the advisor who cares about what matters most - family.

Perfect For: Building family engagement, creating laid-back experiences, generating social media buzz through beautiful photos.

→ [Download Family Summer Event Messaging Kit](#)

2. Collectibles & Heirlooms Appraisal Event

Help clients and prospects discover hidden value in their treasures while showcasing your expertise in protecting what’s important.

Perfect For: Attracting diverse age groups, providing educational value, creating conversation starters, building trust through expert partnerships.

→ [Download Heirlooms Appraisal Event Messaging Kit](#)



Host Events That Bring In the WHOLE family

Cerulli Finds Just 19% of Investors Use Their Parents' Advisor

NOVEMBER 14, 2023 — BOSTON

An opportunity exists for advisors to focus on kindling intergenerational relationships

Just one in five affluent investors use the same advisor as their parents, according to the latest ***Cerulli Edge—U.S. Retail Investor Edition***. Advisors

FINANCIAL
ADVISOR **IQ**

Most Americans Inheriting \$100K+ Won't Stay with Their FA

Financial advisors who can address their clients' big picture, and not just their finances, stand to gain new clients, according to a new report from Equitable.

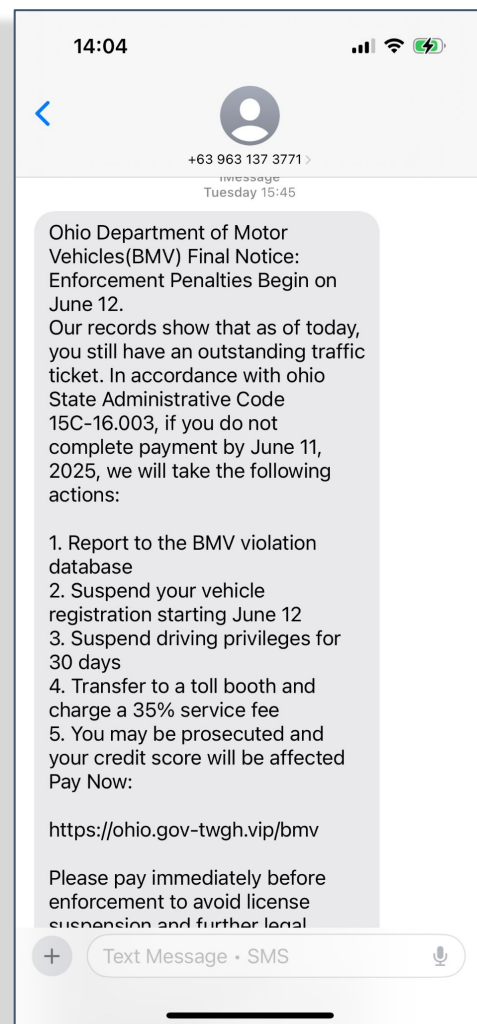
By Alex Padalka | October 10, 2024

The coming wealth transfer may leave some financial advisors wondering where all their clients went — while others may have a field of prospects ripe for the picking, according to a new report.

A recent McKinsey study estimates that more than \$30 trillion will change hands by 2030 — and most of the recipients will be looking for a new advisor. Equitable said it found in a survey of 500 retail investors anticipating receiving an inheritance or primary benefit of more than \$100,000.

Event Idea #1:

Current Scams and how to recognize them:



Current Scams Ideas:

Work with retirees and pre-retirees?

→ Host a workshop on scams targeting seniors (and invite their kids!)

Can you reach out to a local FBI agent?

→ Invite them to do a zoom call on the most popular financial and identity scams right now

Have systems you recommend to clients for how to best store sensitive documents and passwords?

→ Create a "How to Store and Share Your Information Guide" and deliver it as a presentation, giving each attendee a copy of the guide as a take-away

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STONERIDGE
WEALTH MANAGEMENT

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[StoneRidge Foundation](#)

06
Feb

Cybersecurity Made Simple: Fundamentals Of Cybersecurity And Current Cyber Threats

DESCRIPTION

This informative session aims to equip attendees with essential knowledge, tips for recognizing scams before it's too late, and practical changes you can make to safeguard your identity and personal information while enhancing your cybersecurity practices. Mr. Alvarez will deliver an in-depth presentation, followed by a question-and-answer segment to address any queries.

Presenter: Christian Alvarez, Cybersecurity Analyst at LPL

Reserve Your Spot Today!

To register for the webinar, please us this link: https://lpl.zoom.us/webinar/register/WN_6qBpPpj_QKK3fn7nQuTXfA

We look forward to your participation and are confident that you will find the session both valuable and insightful. We are partnering with LPL to help you navigate the digital world with confidence!

DATE AND TIME

Thu, Feb 06, 2025
1:00p – 2:00p PST

LOCATION

Zoom

Source:

<https://www.stoneridgewm.com/events/recap-recording-cybersecurity-made-simple-fundamentals-of-cybersecurity>

Event Idea #2:

Family Picture Day with a Professional Photographer



Maciej Kielbasinski, CIMA®, MBA · 2nd

Associate Financial Advisor at Thrivent

3yr · 🌐

+ Follow ...

Christmas Family Photo Event is back!

We're kicking-off the season giving with a free photoshoot:

December 4, 2021 between 9am and 3pm at Thrivent's Vilicus Financial

Associates in Bloomingdale. Details and signup sheet: <https://lnkd.in/gREYibtc>

thrivent *Christmas Family Photo Event*



👍❤️👍 31


4 comments

Family Picture Day Ideas

- Hire local photographer
- Choose Venue
- Send clients Sign Up Genius Form
- You pay photographer, they pay for photos they want
- Collect names/emails of ALL family members at event
- Have (stain free!) snacks and water on hand!



Family Wealth Conversations - Downloadable



FAMILY FINANCIAL WORKSHOP

Company Name

FAMILY MISSION STATEMENT ACTIVITY

A mission statement is designed to build a shared identity and vision within a company or organization. A family mission statement has a very similar purpose—to help you live intentionally and consciously embrace your values.

STEP 2: WRITE DOWN YOUR VALUES

Give every member of the family an opportunity to write down the values that he or she feels are important to the family.

<input type="checkbox"/> Love	<input type="checkbox"/> Creativity	<input type="checkbox"/> Hard Work
<input type="checkbox"/> Fun	<input type="checkbox"/> Discipline	<input type="checkbox"/> Humor
<input type="checkbox"/> Adventure	<input type="checkbox"/> Honesty	<input type="checkbox"/> Community
<input type="checkbox"/> Education	<input type="checkbox"/> Kindness	<input type="checkbox"/> Integrity
<input type="checkbox"/> Faith	<input type="checkbox"/> Compassion	<input type="checkbox"/> Service

STEP 3: DISCUSS YOUR VALUES AND CHOOSE FEWER THAN 10 TO CONSTRUCT YOUR MISSION STATEMENT

After everyone has written down the values that matter to them, discuss them as a family. The most important thing is to listen carefully to every member of the family no matter how young.

Even children want to know that their contribution matters.

STEP 4: REFINE YOUR MISSION STATEMENT

FAMILY MISSION STATEMENT DRAFT 2:

and adventure in a way that is true to our faith, strengthens our family, and working as


honest with each other. We grow and working as

STEP 5: REVIEW REGULARLY

Your mission statement should be a living document that inspires your day-to-day life.

Keep copies of it on your fridge, in your office, and in your children's rooms so that you can refer to it often.

TELLING STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.

Describe a time that you felt fortunate.

Describe a time that persistence and effort paid off.

Describe a time that you didn't have enough money.

GIVEAWAY:

Everything you Need to Plan A Summer Family Event with a Photographer!

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Summer Events Toolkit

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→ [Download Heirlooms Appraisal Event Messaging Kit](#)

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fmgstyle.com

Host “A Focus on What Matters” Summer Event

A ready-to-use event idea to celebrate family and capture the moment.

Event Overview

What it is:

A relaxed summer evening designed to bring your clients, their families, and future generations together for a meaningful experience centered on connection and memory-making.

What's included:

- ✓ Professional family portraits
- ✓ A keepsake time capsule card activity
- ✓ Food, drinks, and casual summer fun
- ✓ Light legacy messaging—no financial content, just heart and intention

Theme: Celebrate the people and moments that make wealth worth planning for.

Planning Checklist (Quick View)

6 Weeks Out:

- ☐ Hire photographer & consult on venue and lighting
- ☐ Book venue & set event capacity
- ☐ Design & order Time Capsule Cards + envelopes
- ☐ Confirm food & beverage
- ☐ Send out invitations
- ☐ Prep event signage and RSVP tracking system

2 Weeks Out:

- ☐ Finalize guest list
- ☐ Print any branded items and signage, including a spreadsheet on which families can sign up for their time slot for their picture upon arrival

'Do It For Me' Marketing

- Monthly **content marketing** plan with customization tips
- Your own dedicated **Marketing Concierge**
- Increase **client** engagement, **drip on prospects and COIs**
- Take the **heavy lifting off** your plate
- **5-star content exclusively written by Sam & Susan**



Susan Theder

CMO/CXO, FMG



Samantha Russell

Chief Evangelist, FMG

Do It For Me Calendar

January 2025

Check out the content recommendations.

The default is to send emails to ALL contacts and social platforms that are connected. If you want to select a more targeted group, let us know in your email reply.

Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.



Calendar Key

E: Email S: Social media O: Optional social media B: Blog A: FMG automation

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
			B: Innovative New Year...	S: Innovative New Year... S: Reimagining Resolutions...	S: Healthcare Premiums...	S: Focus on Life's Positives...
5	6	7	8	9	10	11
S: National Financial W...			A: Monthly Market Insights...	S: Are You Too Young for...		O: Cool Editing Tip...
12	13	14	15	16	17	18
	S: A \$172 Billion Mistake...	O: National Dress Up Y...				
19	20	21	22	23	24	25
	S: Martin Luther King Jr...	A: Video of the Month...				
26	27	28	29	30	31	
	O: International Helios...	S: New Bill Increases So...				

Recommended Content

Blogs

[January 1: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025](#)

[January 15: 10 Facts You May Not Know About Social Security](#)

Emails

[January 2: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025 - clients and Prospects](#)

[January 2: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025 - COIs](#)

[January 16: 10 Surprising Facts You May Not Know About Social Security - Clients and Prospects](#)

[January 16: 10 Surprising Facts You May Not Know About Social Security - COIs](#)

FMG Automation

Monthly Market Insights - Social Post and Email: Around the 7th of Each Month

Video of the Month - Email Only: Third Week of Each Month

Social Posts

January 2025 DIFM General Social Sequence

[January 4: Focus on Life's Positive Moments](#)

[January 18: Unlock the Full Power of Your Credit Card Points](#)

[January 20: Martin Luther King Jr. Day](#)

[January 23: What's Going on with Non-Competes](#)

January 2025 DIFM Financial Social Sequence

[January 2: Reimagining Resolutions: Smart Financial Goals for 2025](#)

[January 3: Healthcare Premiums Soar Even as Inflation Eases](#)

[January 5: National Financial Wellness Month](#)

[January 9: Are You Too Young for an Estate Strategy?](#)

[January 19: A \\$172 Billion Mistake](#)

[January 16: 10 Facts You May Not Know About Social Security](#)

[January 28: New Bill Increases Social Security Death Benefit](#)

[January 30: Top 5 Gen Z Financial Mistakes](#)

Poll: Would You Like to learn more about
how our team can support your events &
marketing?

(either using the FMG tools or through our
“Do It or Me” Program?)

Event Idea #3:

Antique Appraisal Event



**13
May**

Antique Appraisal Event

DESCRIPTION

Do you have an old family heirloom you've always wondered about? Join us for our Antique Appraisal event and find out what it's worth. Light appetizers and refreshments provided.

Space is limited so RSVP today!

madison@cipadvisor.com

443-249-3514 Ext 102

DATE AND TIME

Tue, May 13, 2025
6:00p - 9:00p EST

LOCATION

Dock House
110 Piney Narrows Rd
Chester, MD 21619

[View on Map](#)

BrokerCheck by FINRA



03

How to Use FMG's Event Tool

04

Promotion – Let's Get the Most People There!

Create a Registration Page People Want to Sign up!

[About](#)[Services](#)[The Voice of EIG®](#)[Blog](#)[Resources](#)[Events](#)[Contact](#)

WEBINAR: SOCIAL SECURITY BENEFITS 01.30.2025

Join us virtually for clarity on Social Security topics that can often seem overwhelming. Learn how your benefit is determined, tips on when to start receiving benefits, how Medicare is connected, plus details on spousal benefits and survivor benefits.

Even if you attended a previous presentation, join us again as regulations change year to year. This webinar is open to the public - share with your spouse, family or a neighbor who is planning for this stage of life.

Live Webinar: Register for this live virtual session. Due to government restrictions, we are not able to record the session. Slides will be available for registrants after the webinar.

Before you attend...

During the presentation you will learn how to use "my Social Security" online account and other online services. In advance of the webinar, go to www.socialsecurity.gov/myaccount to create a my Social Security account and have your Social Security Statement (if applicable).

[Resources](#)[Events](#)[Contact](#)[REGISTER](#)

DATE AND TIME

Thu, Jan 30, 2025
1:00p - 3:00p CST

LOCATION

Webinar: Microsoft Teams

NOTE

Webinar only, presented via Microsoft Teams.

Email Promotion Specifics

Send THREE emails for optimal performance.

- 1 week before
- 1 day before
- 1 hour before

Number of Email Reminders	Average Registrants	Percentage increase over 1 email reminder
1 email reminder only	256	-
2 email reminders	474	+85%
3 email reminders	807	+215%
4 email reminders	798	+212%

Source: <https://danielwaas.com/how-to-increase-webinar-attendance-rates/>

How do you get more clients to refer friends and family?

Marketing Tip:

- To get your clients to bring friends and family to your in person events --- Do this: One week after sending out the initial invitation, resend the invite, but this time, add a few sentences: "Wow, we're thrilled by the excitement for the upcoming 'xxxx' event— we can't wait to see so many of you. Several attendees have reached out asking if you can bring a guest or two. We are limited on space, but would love to host your friends or family. Please RSVP as soon as possible and we'll try to accommodate as many as we can."

Promotion: What if I don't have a big email list?

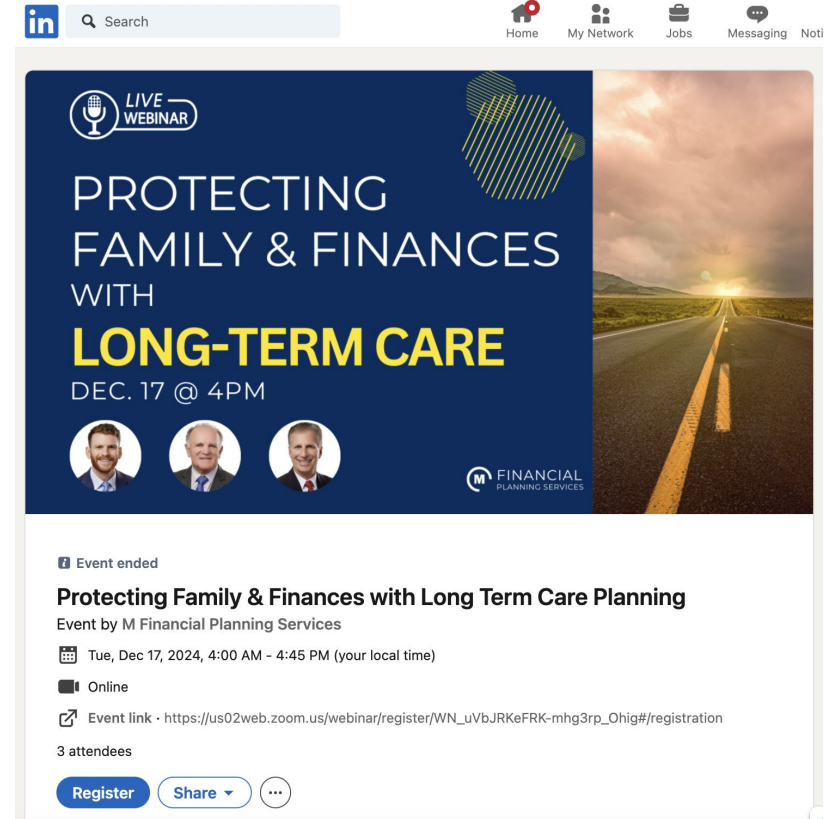
Partner with COI or SME

- Have as a guest and Ask them to promote to their audience too
- Or just share with COIs whose audience could benefit

Social Media

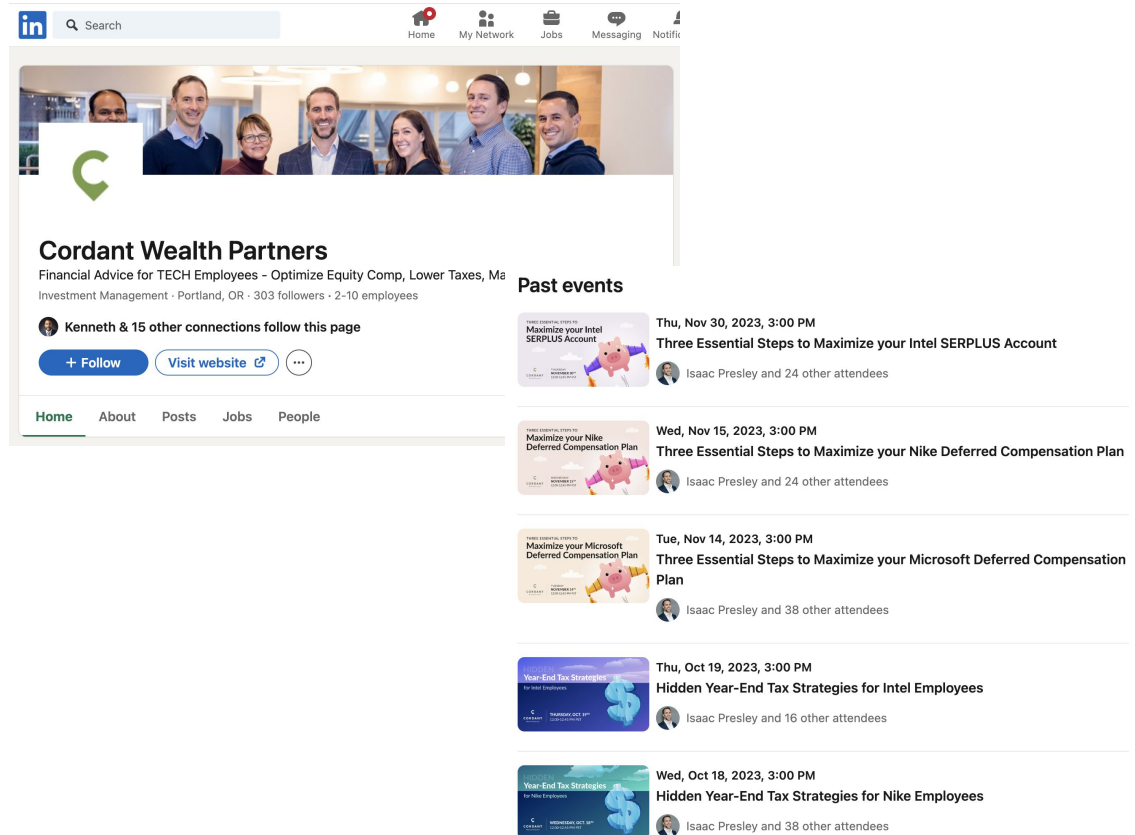
- Posts that focus on the BENEFIT someone gets from joining
- Direct invites via LinkedIn - target your audience
- Setup LinkedIn Event page →

Use LINKEDIN -



Create a LinkedIn Event To Promote Webinar

- Create a LinkedIn event page for your event
- You can invite people directly FROM linkedin (even without their emails!)
- Connected to 500 Nike employees? Filter and invite them all
- You can still use ZOOM to host if not in-person



Social Media Promotion Specifics

- Don't start your post by promoting your event
- Start by talking about a problem your audience has
- Then offer some quick wins (that they get just by reading the post)
- THEN say "we are going to do X event to teach more about this"



Samantha Russell • You

Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Fi...

1w • Edited • 🌐

...

I used to host events and never get real leads from them.. until I started doing these 4 things.

- 1 Use the "WIIFM" approach to write the invitation/email/landing page
 - Clearly articulate what the person attending the event will get out of it
 - If it's a fun event - make it sound fun! include great photos!
 - If its educational, be crystal clear why they need to learn what you'll share
- 2 Have a way to collect names + email for EVERY SINGLE PERSON
 - 💡 TIP: If your event is a LinkedIn Live, Youtube Livestream, a Podcast:You can collect leads easily with [Textiful](#) (my favorite tool)
 - Just say "Text this number and we'll send X to you"
 - (Just be sure what you're sending is amazing and people will want it!)
- 3 If you want people to ACTUALLY spread the word and invite their friends or family:
 - Follow the exact email template I lay out in the video (at the 1:20 mark)
- 4 Skip the hard sell, follow up with even more valuable education:
 - Don't host a great event, but then only do a hard sell afterwards 😞
 - Nobody wants to come to your event and then get 15 emails after of you asking them if they are ready "meet about their finances"

Social Media Promotion Specifics

- Say “comment _ _ _ _” and I’ll send you the link to join us!
- This builds momentum and gets people commenting on the post – which then alerts the algorithm to show it to even more people
- Direct Message and ask for comments/shares
- If you are partnering with a COI or SME – make sure you tag them! Tag the venue too if applicable!

Next week on Thursday, we at **FMG** are hosting a live event where I'll teach you:

1. The top event ideas for 2025
2. How to attract high quality leads to your event
3. The best way to follow up with leads after the event

● If you want to join us, comment "EVENTS" and I'll send you the link to sign up!

BONUS: Everyone who joins signs up will receive an event success checklist with our key takeaways compiled for easy reference all year long!

you've ever held? I'm looking for an advisor to join me and talk about it so please share!

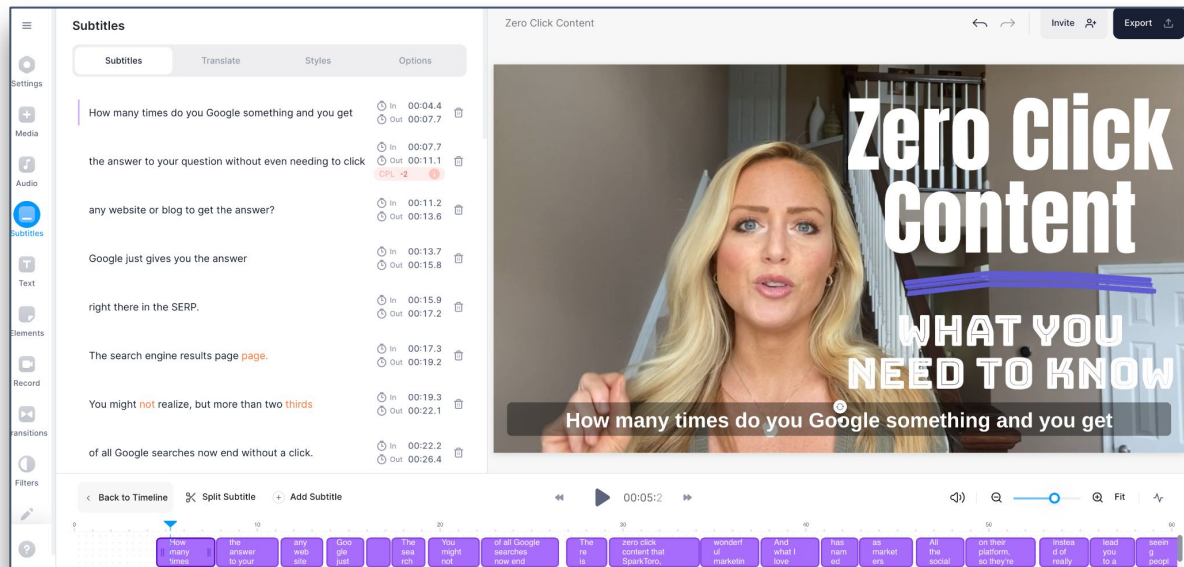


05

Post-Event Steps to Get the Most Bang For Your Buck

Step #1: Edit & Transcribe Video (if Webinar)

- Add subtitles
- Create Short Clips for Promotion (30 sec to 2 mins)
- Transcribe (you'll use this in your blog post)




1. Link Resources

2. Upload video or photos

3. Add Link to Calendar

fmg



FINANCIAL

PLANNING SERVICES, INC.

57 South Maple Avenue, Marlton, NJ 08053

856-810-7701

info@mfinancial.us

Account View

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13

Nov

Family Love Letter™ Webinar - Replay Now Available!

DATE AND TIME

Mon, Nov 13, 2023

11:30a - 12:30p EST


LOCATION

Webinar

DESCRIPTION

Our guest speaker—Karen Drancik from Neuberger Berman , provides excellent examples and anecdotes that demonstrate the importance of estate planning. The Family Love Letter™ is an great way to get started, and is an invaluable resource to your loved ones.

Family Love Letter™ is a non-legally binding, comprehensive document created to offer essential guidance to loved ones during crises or after their passing. It covers personal, financial, legal, and healthcare info, and sharing it eases the burden on family in tough times.




Family Love Letter Media Replay

M FINANCIAL PLANNING SERVICES

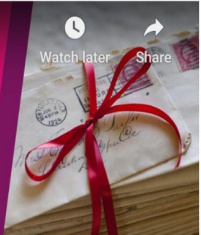
Family Love Letter

MEDIA REPLAY



Watch later

Share



Step #2 – Email all those who registered

- Divide into WHO attended and who DID NOT attended
- Different messaging for each
- Include Call-To-Action to schedule a meeting
- Have COI partners email too

On Mon, May 1, 2023 at 1:33 PM Samantha Russell <srussell@fmgsuite.com> wrote:

Hi Tracy,

Thanks for joining us on our social media webinar last week! It was a ton of fun, and I hope you stepped away feeling re-energized and motivated to connect and engage on social media.

As promised, [here is a link to the replay and slides](#).

Social media can feel a bit like a maze, which is why Stacy's quote really stood out to me: *"It's a dialogue, not a monologue, and some people don't understand that. Social media is more like a telephone than a television."* Wise words indeed! 😊

Our team is always here to help, whether you want to learn more about our "Do It For Me" program or simply want to chat about your social media strategy. [Just click here to book some time with us](#).

Remember, social media is all about engagement, so don't hesitate to reach out if you have any questions. I look forward to staying connected on social media! 😊

Have a great week!

Samantha Russell
Chief Evangelist, FMG



P.S. My next webinar is on May 10 with my friends at Holistiplan. We'll be covering the question – "My clients received their tax return. Now what?" and sharing specific strategies on how to engage with clients after tax day. [Click here to save your spot](#).

Step #5 – Repurpose Content to keep promoting

- Include the replay link/event recap photos in email newsletter
- Post great clips to social -say “Want the full workshop? Comment “Workshop” to get it! (then DM it)
- Turn it into a podcast episode

HOW TO MOVE AWAY FROM THE HARD SELL SO YOU CAN ATTRACT YOUR IDEAL CLIENTS



BE YOUR OWN LOUD

PROUD MOUTH
INFLUENCE ACCELERATION

time on their calendar.

EPISODE #415 | Samantha Russell & Susan Theder | FMG Suite

Ready to Start Generating Leads with Events & Webinars?

- Collect registrants, email invites and automate follow up emails
- Pre-Made Webinar Slides, Scripts & Landing pages
- Direct Integrations with for easy compliance
- New Do It For Me Program

Contact Us: Marketing@fmgsuite.com



A screenshot of the JCL Financial Group website. The header includes the JCL Financial Group logo and navigation links: Home, About Us, How We Help, Events, Resources, Tools. The main content area features a webinar titled "Managing Health Care Expenses In Retirement" scheduled for 07 June. The description states that fifty-seven percent of baby boomers have a "poor understanding" (31%) or know "almost nothing" (26%) about Medicare. It also mentions that three-quarters of baby boomers (72%) did not know that most Americans on Medicare pay premiums, copays, and deductibles. The location is listed as a Zoom Webinar. A list of topics to be covered includes Medicare enrollment periods, health care costs, Medicare and private insurance, and long-term care planning. At the bottom, there is a promotional banner for "Managing Healthcare Expenses in Retirement" by James Lynch, featuring a photo of an elderly couple and the text "SAVVY MEDICARE PLANNING" and "Managing Health Care". The footer includes the BrokerCheck logo.

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