

American SENIOR BENEFITS



Wealth & Estate Planning Seminar

Presenter



Broker & Retirement
Advocate: Mali
Jimenez

Location, Date, & Time

New Fairfield Senior Center
July 27th @ 2:00 Pm

Presenter



Financial
Advisor &
Broker:
Konner
Claywell

Presenter



Broker & Retirement
Planner: Joseph
Antonucci



Refreshments Included



Topics

- *Understanding Pension Options
- *Social Security Planning
- *Proper Asset Allocation
- *Comprehensive Income Planning
- *Estate Planning
- *Final Expense Planning
- *Required Minimum Distribution Strategies

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Who We Are

We are a nationwide retirement planning agency and local insurance company with over 50 dedicated professionals who have proudly served our 55+ community for over 30 years.