



LEGACY FINANCIAL
—STRATEGIES—

Fall 2023 Client Education Series

Our mission is to help you financially live the story you want to share

September Events			
Date & Time	Event	Presenters	Description
September 12 Tuesday 2:00 - 3:00 p.m.	Financial Foundations for Teenagers & Young Adults	Ryan G. Poll, CFP® Jon T. Hooiman, RICP® Dallin J. Wilcox, CRCP® Skyler R. Hardman	If you could go back in time and give your teenage or young adult self financial advice, what would it be? Would you have done things differently with your finances? This class will teach the rising generation financial principles that could benefit them the rest of their lives.
September 26 Tuesday 2:00 - 3:00 p.m.	Retain Your Brain	Matt Montague* Regional Vice President Hartford Investments	So, can we financially prepare for the possibility of cognitive decline and prevent, or at least slow, the aging of our brains? More and more research reveals a powerful message: that we – not our genes – can have control over our cognitive health today and the destiny of our brains.
October Events			
Date & Time	Event	Presenters	Description
October 10 Tuesday 2:00 – 3:00 p.m.	Medicare Made Easy	Tracy McNally* Medicare Agent Switch Insurance	Open Enrollment for Medicare goes from October 15 – December 7. Before you determine what plan you will select for the upcoming year, learn what options are available.
October 17 Tuesday 2:00 - 3:00 p.m.	Anatomy of a Recession	TJ Geis* Regional Vice President Franklin Templeton Investments	Financial storms come and go. Some of the storms are severe and some are mild. Are we on the brink of a recession? If so, how long will it last? How bad will it get? Should I be worried? Should I change my investment strategy? These and many more questions will be addressed during this presentation.

Please RSVP by calling (801) 525-9800

We will send you the meeting ID and passcode for the events you want to attend.

All events are held via Zoom Webinar.

All times listed above are in Mountain Standard Time (MST)

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*Matt Montague, Tracy McNally & TJ Geis are not affiliated with Raymond James.

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