

# My Secure Advantage<sup>®</sup>

FINANCIAL WELLNESS EVENT



Tuesday,  
June 8<sup>th</sup>

My Secure Advantage<sup>®</sup> (MSA) is your employer-paid financial wellness benefit. No gimmicks, no hidden agenda. We're real people with a real passion for helping you achieve your financial goals. Join us for our educational event!

## Common Risks to Your Retirement Plan

Register: [bit.ly/GTY6821A](https://bit.ly/GTY6821A)

9:00 – 10:00am PT

The first steps of creating a retirement plan generally involve a focus on retirement savings and securing sources of income in retirement. We will review risks that could impact your plan before and during retirement so that you have a better chance of living your retirement dream.

## Estate Planning: Financial Basics

Register: [bit.ly/GTY6821B](https://bit.ly/GTY6821B)

11:00am – 12:00pm PT

Many of us know we should have an estate plan, but we don't know how to get started – or when to get started. In this presentation, we discuss the common components of an estate plan and explain how your plan may change as you go through different stages of life. Lastly, we will cover the pros and cons of hiring an attorney, versus doing most of the work yourself.

## Investing: Risk Considerations & Taxes

Register: [bit.ly/GTY6821C](https://bit.ly/GTY6821C)

1:00 – 2:00pm PT

This class reviews five types of investment risk and discusses how time frames might influence the type and amount of risk an investor is willing to take. We'll also cover tax implications of investing and conclude with examples of investing and possible risks.



Register, even if you cannot attend, to receive a recording of the webinar.

## Assessment & Action Plan

Complete MSA's online assessment to quickly pinpoint your goals, highlight financial priorities and get next steps. Visit [getty.mysecureadvantage.com/self-assessment](https://getty.mysecureadvantage.com/self-assessment).



Complete MSA activities to gain financial confidence and chances to win a gift card each month that you're eligible.

**Boost Financial IQ** | Register for your MSA website and attend any live class or webinar in the same month.

**Chart Your Course** | Take MSA's online financial assessment and receive tailored next steps in minutes.

**Partner with an Expert** | Complete two coaching consults in a month to build a game plan that works for you.

Winners selected monthly and contacted by My Secure Advantage, Inc. via email.  
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