**TO USE THIS TEMPLATE:**

**COPY EVERYTHING AND PASTE INTO A NEW MAIL MESSAGE IN OUTLOOK.**

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**Are Your Investments on Track?**

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| ***The best investing strategy is a carefully planned and prepared approach to managing and accumulating money. A well-planned strategy can help you meet your short-term, mid-term, and long-term financial goals. Investment planning requires discipline and patience. But it doesn’t have to be difficult.*****It is not necessary to do extraordinary things to get extraordinary results -- Warren Buffet****In this seminar on Investment Planning, you'll learn:*** Investment fundamentals, including the effects of inflation and compounding
* How to identify financial goals and time horizons
* How to measure your risk tolerance, and the relationship between risk and return
* The difference between cash equivalents, bonds, stocks and mutual funds, and the importance of asset allocation

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.R.S.V.P.**To reserve your spot, please contact me at:**When & Where**DATETIMELOCATION****IMPORTANT DISCLOSURES**Broadridge Investor Communication Solutions, Inc. does not provide investment, tax, or legal advice. The information presented here is not specific to any individual's personal circumstances.To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.These materials are provided for general information and educational purposes based upon publicly available information from sources believed to be reliable—we cannot assure the accuracy or completeness of these materials. The information in these materials may change at any time and without notice.Securities and investment advice offered through Investment Planners, Inc. (Member FINRA/SIPC) and IPI Wealth Management, Inc., 226 W. Eldorado Street, Decatur, IL 62522. 217-425-6340 This communication is strictly intended for individuals residing in the state(s) of IL. No offers may be made or accepted from any resident outside the specific states referenced.  |

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