

PRE-RETIREMENT BOOTCAMP

Are you on track to achieve the retirement of your dreams?

Whether retirement is 10-15 years away, or you're planning to retire soon, our team is here to guide you every step of the way.

Join us for a two-part workshop covering essential topics to understand when planning for your retirement.

Part I

Wednesday, May 8, 2024
11am PT / 2pm ET

Navigating Your Financial Future:

*Unraveling Social Security, Medicare,
and Tax Essentials*



Nick Lamb, CFA®
Financial Advisor



Derrick Byrd, CFP®
Financial Advisor

Part II

Wednesday, May 15, 2024
11am PT / 2pm ET

Mapping Your Financial Journey:

How to Make Your Money Last in Retirement



Chad Olson
Financial Advisor



Kyle Thompson, AIF®
Financial Advisor



Hosted by:
Sophie Benander
VP, Growth and Partnerships



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