



A CONFIDENT FINANCIAL FUTURE

PRESENTED BY:

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THREE PHASES OF RETIREMENT

What Time Is It Now?

HOT TOPICS

1. The 8 Common Financial Tools

2. _____ vs. _____

Age appropriate decisions for your investments

3. _____ Benefits - How to Retain More

4. _____ Care - Resolving the Dilemma

INVESTMENT TOOLS

All have _____.

You can lose or make _____.

1. Stocks

2. Mutual Funds

Is diversification the key to safety?

Are mutual funds safe?

3. Variable Annuities

4. Bonds

When the interest rates go up, bonds go _____.

SAVINGS TOOLS

Your _____ cannot go up or down based upon market conditions.

1. Banks - CDs

2. Annuities

a. _____

b. _____

[illegible]



Berry

FINANCIAL GROUP, INC.

For we are God's handiwork, created in Christ Jesus to do good works, which God prepared in advance for us to do. Ephesians 2:10

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