Join Us For Social Security Planning & Fine Dining

YOU ARE CORDIALLY INVITED TO ATTEND OUR ADVANCED SOCIAL SECURITY STRATEGY AND PLANNING WORKSHOP. We will clearly present valuable information that may help increase your income, reduce your risk, lower taxes, and keep you on the path towards the comfortable and secure retirement that you are pursuing.

Speaker Worth Listening To

Adam Bishop, CFP®, Adam Bishop's enthusiasm for financial planning is rooted in his desire to preserve and enhance the manner in which his clients live. Money is not everything, but for over ten years, Adam has witnessed firsthand how the benefit of prudent financial advice manifests in almost every part of his client's lives.

As a founder of Unified Wealth Management, Adam recognizes the importance of commitment to the job, and long term relationships with his clients whom he regularly refers to as family. Adam is a conservative wealth advisor whose professional mantra is: "financially bullet proofing my clients as effectively as possible." In working with retirees and soon-to-be retirees, Adam realizes how overwhelming preparing for career transition and long retirement can be. Whether it is financial security to last a lifetime, or legacy planning for the entire family, Adam strives to deliver results based financial planning and sound meaningful advice.

Adam is a practicing CERTIFIED FINANCIL PLANNER™ (CFP®) professional and holds his Series 7, and 63 securities registrations through LPL Financial and Series 65 registration with LPL Financial and Unified Wealth Management. He also holds life and health insurance licenses. Adam graduated from Colorado State University, and completed his pre (CFP®) financial planning course work through Boston University center for professional education.

When Adam is not working he can be found racing his mountain bike or climbing mountains in Arizona and across the country. Adam enjoys spending time with his family and supporting his family's effort to enhance the lives of underprivileged children.

PRESENTATION: SAVVY SOCIAL SECURITY PLANNING

Learn strategies that can potentially help YOU!

- 5 factors to consider when deciding when to apply for benefits
- Why you should always check your earnings record for accuracy
- How to coordinate benefits with your spouse
- How to minimize taxes on Social Security benefits
- How to coordinate Social Security with your other sources of retirement income

Social Security is far more complicated than most people realize. The decisions you make now can have a tremendous impact on the total amount of benefits you stand to receive over your lifetime. This informative seminar covers the basics of Social Security and reveals innovative strategies for maximizing your benefits.

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Unified Wealth Management, a registered investment advisor and a separate entity from LPL Financial.

SEATING IS LIMITED, YOU MUST RSVP!

***PLEASE CALL* 866-837-8299 OR EMAIL RECEPTIONIST@UNIFIEDFS.COM BY FRIDAY, OCT. 16TH TO RESERVE YOUR SEAT!**

THIS IS AN EDUCATIONAL WORKSHOP, NO PRODUCTS WILL BE SOLD.
NO AGENTS, BROKERS OR ADVISORS PERMITTED. PLEASE NO ATTENDEES UNDER THE AGE OF 40.

Unified Wealth Management

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Scottsdale, Arizona 85253
Tel 480-668-3016 Toll-Free 866-837-8299 Fax 480-668-3416
www.uwealthmangement.com

ATTEND A *FREE* WORKSHOP BELOW!

– Dinner –

Wednesday, Oct. 21ST, 2015

6:00 PM — 8:00 PM

OR

– Dinner –

Thursday, Oct. 22ND, 2015

6:00 PM — 8:00 PM

THE CAPITAL® GRILLE

2502 East Camelback Road | Phoenix, AZ 85016

PLEASE RSVP – CALL **866-837-8299** OR EMAIL **RECEPTIONIST@UNIFIEDFS.COM** BY **FRIDAY, OCT. 16TH, 2015**

Menu

APPETIZERS

Pan-Fried Calamari with Hot Cherry Peppers
Miniature Lobster and Crab Cakes

SOUPS / SALADS

Field Greens, Tomatoes, Fresh Herbs

ENTREES

Seared Citrus Glazed Salmon
Bone-In Kona Crusted Dry Aged NY Strip with Shallot Butter
Filet Mignon or All-Natural Herb Grilled Chicken

SERVED WITH

Sam's Mashed Potatoes and Seasonal Fresh Vegetables

DESSERTS

Flourless Chocolate Espresso Cake or Classic Creme Brulee

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You are Cordially Invited

Social Security Strategies & Family Income Planning:

What You Need to Know to Maximize Social Security Income

Investment, Estate & Tax Planning
All Under One Roof!

PLEASE JOIN US AND LEARN.