

# Join Us At Ventana Grill For a Private “Roundtable” Lunch or Dinner



Enjoy an early afternoon or evening of complimentary fine dining in a fun, relaxed atmosphere while being able to ask a leading local advisor any questions you have. Your financial goals, current markets, general estate or tax planning, real estate, and your financial questions are topics du jour.

**Reservations Required**  
**Space is limited to 8 guests per event**

Your host is Thomas B. Paine of Paine Financial Services. For 40 years Mr. Paine has worked with those in or near retirement. Tom takes a unique approach to advising clients, using “rules based” strategies for allocating assets and reducing risk during challenging times.

**This is not a seminar. It is a private, fun, relaxing time to freely discuss financial questions and gather information.**

Possible topics include:

- Simple rules to reduce stock market risk
- Potential financial effects of the war in Europe
- Creating more income\*
- Using “Buffers” to protect from stock market losses
- Inflation and interest rates and their effect on financial markets and your money.
- Managing money inside your 401k

*Ventana Grill*

**Wednesday, March 30th**

**12:30—2:00pm or**

**4:30 – 6:30pm**

**Exit 191B in Shell Beach**

**Please call 805-473-6679 or email [dredden@cfiemail.com](mailto:dredden@cfiemail.com) or  
book online at [www.avilavalleyadvisors.com](http://www.avilavalleyadvisors.com)**

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