



Hi {Firstname},

Our Retirement Readiness newsletter features a pre-retirement checklist offering a quick snapshot of how prepared you are, a fun video on setting up financial goals for success, a quiz to find out your investment IQ, and 4 really good reasons to invest. Hope you enjoy, and as always, reach out with any questions. Have a great day!

And the Executor Is

The right executor may help ensure the distribution of your assets is done with as little upheaval as possible.

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Once Upon a Goal

Do you know how to set up your financial goals for success? This knight does.

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What's Your Investment IQ?

You make decisions for your portfolio, but how much do you really know about the products you buy? Try this quiz

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Four Really Good Reasons to Invest

There are four very good reasons to start investing. Do you know what they are?

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Lisa Valerio

Lisa@Valeriofinancialgroup.com

203.283.9204

Valerio Financial Group
Financial Advisor

<http://www.valeriofinancialgroup.com>

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