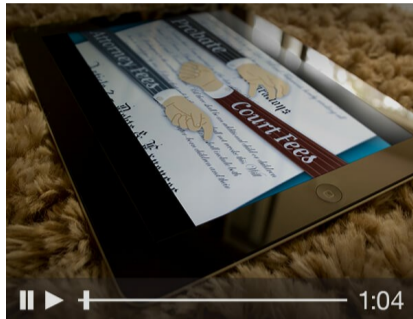




Hi {Firstname},

Our newsletter this month features considerations for managing your estate, 9 facts about Social Security, what to do when your heirs are imperfect, and how to make sure your investments can support your retirement lifestyle. Hope you enjoy, and as always, reach out with any questions. Have a great day!



### Estate Management 101

A will may be only one of the documents you need—and one factor to consider—when it comes to managing your estate.

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### 9 Facts About Social Security

There are things about Social Security that might surprise you.

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### When Heirs are Imperfect

The money problems or bad lifestyle habits of adult children could lead to the squandering of any inheritance they receive.

[Learn More](#)

### Does Your Portfolio Fit Your Retirement Lifestyle?

Lifestyle considerations in creating your retirement portfolio.

[Learn More](#)



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