

Retirement Workshop for Your Employees

“Understand your Retirement Plan”

Hire a Fee-Only* Retirement Planning Consultant for a day

One-on-Few Workshop
One-on-One Personal Consulting

On-Site at Your Business Location

Convenient, easy one-day fee \$1,200

Employee Retirement Plan in Place?

**Help Your Employees understand and leverage your Retirement Plan...
And beyond**

- Educational “one-on-few” hourly workshops
 - The importance of retirement planning
 - Explain your company Retirement Plan options
- Hourly one-on-one consultative sessions with employees
- Optional Retirement Planning services available

No Employee Retirement Plan?

Help Your Employees develop their own Personalized Retirement Plan

- EMPLOYEES:
 - Hourly one-on-one consultative sessions
 - Education on personal retirement planning
 - Q & A
- OWNERS: Optionally, we can work with you to develop a low-cost employee retirement plan

Example Topics: IRA's, Roth vs Traditional, Roth Conversions, Tax-Efficiency, Successful Aging, Maximizing Social Security, basics of Medicare, Budgeting to Success

We can tailor a program to meet your needs!

Employees will have no-charge access to our budgeting and account aggregation software!!!



248-564-1404



KastlerFinancialPlanning.com

*Fee-Only means we are fiduciaries, no commissionable products, and act in the best interest of the client

Investment advisor representative of and investment advisory services offered through Garrett Investment Advisors, LLC., a fee-only, SEC-registered investment advisor. Tel: (910)-FEE-ONLY. Kastler Financial Planning may offer investment advisory services in the State of Michigan and in other jurisdictions where exempted.