

# “Financial Advisor”

{fi-nan-shuhl • ad-vahy-zer}

A professional who helps individuals manage their finances by providing advice on money issues such as investments, insurance, mortgages, college savings, estate planning, taxes and retirement.

## Who should use a financial advisor?

### NEW FAMILY

- Life Insurance
- College Planning
- IRA's & Savings

### MID-CAREER

- Retirement Planning
- Long Term Care
- Social Security Analysis

### RETIREMENT

- Retirement
- Wealth Transfer
- Succession Planning

**CALL TODAY to set up a time to start planning your present & future financial path!**

### Advisor Name

LPL Approved title  
advisor.name@lpl.com

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**INVESTMENT CENTER**  
—ADVISOR GROUP—  
BETTER TOGETHER

approved location address

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