

Special
seminar
invitation

Domestic Partners: Tax, Retirement, and Estate Strategies

Your family is unique. What about your financial strategy?

The definition of “family” is changing for many Americans, and there are many people living in unmarried households. Unfortunately, a traditional financial strategy may not meet the unique needs of some of these evolving families.

Whether you are in an unmarried same-sex or opposite-sex partnership, it’s important to know how planning strategies for taxes, retirement, and your estate may differ from those of married couples.

That’s why we created **Domestic Partners: Tax, Retirement, and Estate Strategies**. In this insurance sales presentation we’ll discuss:

- Tax, retirement, and estate-planning strategies for unmarried domestic partners
- Special rules to consider for nonspouse partners
- Issues specific to divorce or separation

Join us for this exclusive seminar and explore some of the planning strategies that may be appropriate for domestic partnerships.

Domestic Partners: Tax, Retirement, and Estate Strategies

Call me today to register.

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For all that’s ahead.®

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