

Smart Money Moves for Retirement

Long-term
strategies
to help you
prepare for
a financially
secure
retirement



In Partnership with
Pacifica High School

COURSE INSTRUCTOR

Nick Bautista, CFP®

Nick Bautista, CFP® is a local financial educational teacher, who has been teaching and hosting financial educational workshops for the past three years.

Nick draws on his personal financial experience through the clients he has worked with over the past several years. He creates his own style to help you understand the most important issues to help you retire successfully.

Nick Bautista is a Registered Representative and Investment Adviser Representative with/and offers securities and Advisory Services through Commonwealth Financial Network, Member FINRA/SIPC. A Registered Investment Adviser.

“Nick creates his own style to help you **understand the most important issues** to help you retire.”



INFO

Location:

Pacifica High School
883 W 15th St.
Newport Beach, CA 92663

Cost: \$49

Couples can attend together and may pay an additional \$15 for an additional workbook.

Checks payable to your course instructor (Nick Bautista)

Class Dates:

Class 1

Tuesday 9/13 at 6:30 – 8:30pm
Tuesday 9/20 at 6:30 – 8:30pm

Class 2

Thursday 9/15 at 6:30 – 8:30pm
Thursday 9/22 at 6:30 – 8:30pm

EASY REGISTRATION OPTIONS

1. Call 949-333-6394 – Ask to register for the “retirement workshop”
2. Mail in the registration card below
3. Go online to www.phillipswealthmanagement.com/register
4. Pay by credit card



REGISTRATION CARD

I plan to attend:

Class 1

Tuesday 9/13 at 6:30 – 8:30pm
Tuesday 9/20 at 6:30 – 8:30pm

Class 2

Thursday 9/15 at 6:30 – 8:30pm
Thursday 9/22 at 6:30 – 8:30pm

My Name

My Address

City, State, Zip

Phone Number

Email Address

Registration cost: \$49 *Make check payable to your course instructor (Nick Bautista)*

Do you plan on bringing your spouse? Y / N (circle one)

IF YES, please include \$15 extra if your spouse would like a workbook.

Spouse Name:

Mail to: 19712 MacArthur Blvd. Ste 225 Irvine, CA 92612

This course will help answer the retirement questions you have been thinking about.

- How much do I need to save for retirement?
- When can I retire?
- Will I run out of money in retirement?
- When should I claim Social Security?
- How does Medicare work?

LEARN TO

- Build a Long Term Retirement strategy
- Become financially secure
- Reduce your risk and build an investment strategy to sustain you in retirement
- Reduce your taxes now and in retirement
- Other retirement strategies and more...

OPTIONAL FINANCIAL PLANNING ASSESSMENT

Your financial education workshop includes a free financial planning consultation where you will be given the opportunity to ask any questions regarding your financial goals and dreams.

COURSE AGENDA

In this class we will be exploring essential topics to help you make smart money moves for your retirement:

THE COURSE WILL COVER THESE TOPICS:

- Building a Retirement Foundation
- Budgeting and Paying Off Debt
- Retirement Income
- Investments
- Risk Management
- Estate Planning

Workbook

Each participant will receive a 130 page color workbook, with examples and fill in style format to keep you engaged and learning the concepts that will stick.

Nick Bautista, CFP® (CA Insurance Lic.#0G06508), is a Registered Representative and Investment Adviser Representative with/and offers securities and Advisory Services through Commonwealth Financial Network, Member FINRA/SIPC. A Registered Investment Adviser. Fixed insurance products and services offered through Mark Phillips & Associates or CES Insurance Agency.

MARK PHILLIPS & ASSOCIATES

19712 MacArthur Boulevard, Suite 225, Irvine, CA 92612
949-333-6394 office | 949-333-6392 fax

Register Today!

949-333-6394

www.phillipswealthmanagement.com/register

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SEE INSIDE

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Irvine, CA 92612

ADULT EDUCATION

An Educational Workshop for People Ages 50 – 70+

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