



## Featured Speaker

### **Vicki L Monaco**

Vicki Monaco is an investment Advisor Representative of Royal Fund Management, LLC. Vicki is also insurance licensed in the state of Iowa. She is a member of the **National Ethics Association**, member of the **Central Iowa Senior Education Network**, and is an often requested presenter and speaker on retirement topics. She is CEO of Life and Legacy Advisors.

COST: **FREE**

This Lifestyle Planning workshop is Free

**Refreshments provided:**

**CALL, RESERVE YOUR SEAT TODAY!**

# Lifestyle Planning Workshop

## Financial planning does not stop on the day of your retirement!

Come and learn about asset allocation, income planning and an overview of the markets. We discuss the importance of having legal documents in place and how to organize your financial world!

### List of topics covered:

- Risk Tolerance
- Asset Allocation
- Income Planning
- Surviving Spouse Topics
- Required Minimum Distributions
- Estate Planning

**Monday April 15th,  
2pm to 3pm  
at**

**Vintage Cooperative of Ankeny  
1250 SW Magazine Rd.**

Limited seating: By reservation Only

call **515-964-7906**