The Legacy Workshops

Creating, Growing, Enjoying & Sharing Your Financial Legacy

TO SCHEDULE A LEGACY WORKSHOP FOR YOUR COMMUNITY, FACILITY OR ORGANIZATION:

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LEARN MORE ON THE WEB AT:
THELEGACYWORKSHOPS.COM

Specializing in financial legacy education, our licensed agents bring important concepts and sometimes overlooked details to light for those who desire to create a vision for their family's financial legacy – from accumulation to growth, to distribution, to transfer to heirs; focused on safety of principal with tax-advantaged growth and distribution.

Some specific areas of learning are Tax-free Retirement, Flexible College Savings, Retirement Asset Preservation With Growth, Final Expense Planning (including options for those with medical history), Final Needs Planning and Affordable Legal Services and Identity Theft Protection.