



## SAVE THE DATES:

**You and a Guest are Cordially Invited to Attend Any or All of  
the Following Educational Workshop Lunches**

### Financial Control & Empowerment Investment Series!

- Unsure how to invest your 401k?
- Need to balance concurrent goals? Saving for Retirement? College?
- Need to rebalance your current portfolio?
- Require sophisticated strategies for managing concentrated stock?
- Are your financial papers in order?

**Financial concerns can create stress in our lives.  
Tara Fowler, CFP®, CRPC® & Financial Advisor at Merrill Lynch  
will help explore ways to improve your financial well-being.**

Join us from 12-1:30 PM on the following dates:

**Wednesday, September 24, 2008**  
**Achieving Your Retirement**

**Wednesday, October 1, 2008**  
**The Art of Asset Allocation**  
**Building Your Portfolio**

**Wednesday, October 22, 2008**  
**Organizing Your Financial Life**

**Wednesday, November 5, 2008**  
**Estate Planning**

**Town Restaurant**  
**716 Laurel Street San Carlos**  
**Please RSVP to 650-579-3034. Space will be limited**

