



You and a guest are cordially invited
To dine with Merrill Lynch discussing

Women & Retirement

*Every Woman Has A Unique Vision of Her
Retirement.*

Do You Have a Plan to Match Your Vision?

By 2010, women will control \$22 trillion, or 60% of the world's wealth.
Intelligent women need savvy investment strategies to meet our
unique challenges.

- Portfolio Assessment & Wealth Building
- Retirement Allocation & Distribution Strategies
- Financial planning considerations for living longer
- Caregiver "Sandwich Generation" considerations
 - Lifetime Income Sources
 - Tax Efficient Wealth Transfer Strategies
 - Investing tips and current market updates

Wednesday September 24, 2008

12:00-1:30 luncheon

Town Restaurant

716 Laurel Street, San Carlos

Featured Speakers

Tara Fowler, CFP® CRPC®, Merrill Lynch Financial Advisor
Steve Wilson, AXA Distributors

Space is limited. RSVP by 9/10/2008 to 650-579-3034

