

## **OPTION #1 General Bio**

*Marvin Constance* is a well-known local expert in the matters of retirement and retirement income planning. *Since 1988/For nearly a decade/For the last 22 years, he* has helped people in *City* and throughout the state of **State** retire safely and securely. In fact, none of *Mr. Constance's* clients have ever lost money in the stock market while working with *him*. *His* clients include retirees from *Home Depot, General Electric and Costco*.

As a retirement and income planning specialist, *he* assists retirees and those about to retire, protect their savings, reduce income taxes & taxes on social security benefits and create a retirement income guaranteed to last as long as they do.

*Marvin* is a graduate of *Colorado State University*, where he majored in *finance*. He is a *Certified Financial Fiduciary (CFF™)* and has pledged to always put the needs of *his* clients above *his* own.

*Marvin* has been married to *his high school sweetheart, Becky, for over 32 years*. They have *three children* and reside in *City*. In his spare time, *Marvin & Becky enjoy travelling and long walks on the beach*.

### ***FILL IN BLANKS IN REFERENCE TO BIO ABOVE***

\_\_\_\_\_ is a well-known local expert in the matters of retirement and retirement income planning. \_\_\_\_\_ helped people in \_\_\_\_\_ and throughout the state of \_\_\_\_\_ retire safely and securely. In fact, none of \_\_\_\_\_ clients have ever lost money in the stock market while working with \_\_\_\_\_. \_\_\_\_\_ clients include retirees from \_\_\_\_\_.

As a retirement and income planning specialist, \_\_\_\_ assists retirees and those about to retire, protect their savings, reduce income taxes & taxes on social security benefits and create a retirement income guaranteed to last as long as they do.

\_\_\_\_\_ is a graduate of \_\_\_\_\_, where \_\_\_\_ majored in finance. \_\_\_\_ is a \_\_\_\_\_ and has pledged to always put the needs of \_\_\_\_ clients above \_\_\_\_ own.

\_\_\_\_\_ has been married to \_\_\_\_\_ for over \_\_\_\_ years. They \_\_\_\_\_ and reside in \_\_\_\_\_. In \_\_\_\_ spare time, \_\_\_\_\_ enjoys \_\_\_\_\_.

## OPTION #2 Seminar Producer

*Joe Smith*, a well-known financial educator in *City*, teaches retirement classes that have been widely attended by retirees of *Lockeed, Home Depot and Disney*. *He* has developed a specialty in working with retirees, and those about to retire, who want to protect their principal and ensure that their money lasts. For the *last 15 years*, *Joe* has helped *his* clients avoid the common mistakes made by many retirees, and *he* explains how *he* has counseled hundreds to avoid these pitfalls. If you attend one workshop this year looking for ways to help protect your capital, don't miss *Joe's* presentation.

*Joe* helps people throughout the state of *State* cut their income taxes, reduce, and in some cases, eliminate taxes on social security benefits and establish a retirement income that is guaranteed for life. *He* has lectured widely on these, and other financial topics, at *Mission College and College of the Canyons*. His "*Retirement Shield*" class has been widely attended in the *Major City* area.

*Joe* is a graduate of *Colorado State University*, where he majored in *finance*. He is a *Certified Financial Fiduciary (CFF™)* and has pledged to always put the needs of *his* clients above *his* own.

*Joe* has been married *to his high school sweetheart, Becky*, for over *32 years*. They have *three children and* reside in *City*. In his spare time, *Marvin & Becky enjoy traveling and long walks on the beach*.

### *FILL IN BLANKS IN REFERENCE TO BIO ABOVE*

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\_\_\_\_\_ helps people throughout the state of State cut their income taxes, reduce, and in some cases, eliminate taxes on social security benefits and establish a retirement income that is guaranteed for life. \_\_\_\_\_ has lectured widely on these, and other financial topics, at \_\_\_\_\_. \_\_\_\_\_ class has been widely attended in the \_\_\_\_\_ area.

\_\_\_\_\_ is a graduate of \_\_\_\_\_, where \_\_\_\_\_ majored in \_\_\_\_\_. \_\_\_\_\_ is a \_\_\_\_\_ and has pledged to always put the needs of \_\_\_\_\_ clients above his own.

\_\_\_\_\_ has been married \_\_\_\_\_ for over \_\_\_\_\_ years. They have \_\_\_\_\_ and reside in \_\_\_\_\_. In his spare time, \_\_\_\_\_.

### **OPTION #3 Radio Host**

*FIRST & LAST NAME* is a well-known financial educator in *CITY* and the host of the popular weekly financial radio show, *RADIO SHOW NAME*. *He* is sought after throughout the state of *STATE* for *his* expertise in retirement planning and retirement income planning. *His* clients include retirees from *WELL-KNOWN COMPANIES CLIENTS HAVE WORKED*.

As a retirement and income planning specialist, *NAME* assists retirees and those near retirement with protecting their savings, reducing income taxes and taxes on social security benefits, and creating a retirement income guaranteed to last as long as they do.

*NAME* is a graduate of *COLLEGE ATTENDED*, where *he* majored in *MAJOR*. *He* is a *CREDENTIALS AND ACCOLADES* and has pledged to always put the needs of *his* clients above *his* own.

*NAME* has been married to *his high school sweetheart, Becky*, for over *32* years. They have *three children* and reside in *CITY*. In *his* spare time, *NAMES* enjoy *traveling and long walks on the beach*.

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