

Sterling Financial Advisors Invite You to Attend a

COMPLIMENTARY MEAL
AND INFORMATIONAL
RETIREMENT DISCUSSION

Complimentary dinner will be served at



DAN OHLWILER

CA Dept. of Insurance License #0601944; AW 06173182



Professionally licensed in both the securities and insurance industries, Dan has been in the financial services industry since 1981 and has been working specifically in the retirement market since 1984, when he began conducting his informational retirement workshops. He has had the opportunity of meeting with thousands of great people over the years because of his understanding and knowledge of the ever-changing tax laws affecting distributions from IRAs, 401(k), 403(b) and other retirement plans. Using this knowledge, he has helped his clients design customized retirement plans to meet each individual client's needs and goals. Taking a conservative approach in the planning process, Dan works hard to help protect his clients' hard-earned principal and enjoys working with many of the great people over the years who have become part of the family at Sterling Financial Advisors.



25950 Acero, Suite 310 • Mission Viejo, CA 92691

IS THE CURRENT MARKET VOLATILITY AFFECTING YOUR RETIREMENT ASSETS?

Please join your host **Dan Ohlwiler** for a **presentation and dinner** especially designed for retirees or those retiring soon. He will explain (in plain English) the latest IRA/401(k) rules and tax-saving strategies, along with common mistakes that can be avoided – if you know what you’re looking for.

WE WILL BE DISCUSSING:

- Why taxes may be the **biggest retirement** risk you haven’t planned for.
- How to create a **TAX-FREE income retirement** from your current 401(k)/403(b)/IRA or using non-IRA money.
- Learn to **protect your assets** from getting eaten up by long-term care and healthcare costs.
- How to identify the right tax choices today that can save you hundreds of thousands of dollars in retirement.
- How you can benefit from recent tax legislation to **reduce your taxes**.
- Learn to take advantage now of a **2-6 year tax window**.
- How to transfer assets and create a **legacy tax-efficiently**.

DATES, TIMES & LOCATION

Dinner
Wednesday, June 19
5:00 p.m.



Dinner
Monday, June 24
5:00 p.m.

2961 Michelson Drive | Irvine, CA 92612

RESERVATIONS ARE REQUIRED

Casual Business Attire Recommended

Call our reservation line at: **(833) 786-1883** (Toll-Free, 24 Hours)

— or —

Register online at: **www.youRSVP.com** and enter: **JAGJAP**

Because space is limited, this workshop is designed for those 55 or older who have investable assets of at least \$250,000. We ask that you be considerate and not bring children or other family members under that age. Our seminars do start on time so please arrive 5-10 minutes early to check in. Doors will close at 5:15p.m. We respectfully request that Financial Professionals including Advisors and Brokers DO NOT attend. We reserve the right to withdraw this invitation at any time to those who do not meet these guidelines. Investment advisory services offered only by duly registered individuals through AE Wealth Management, LLC (AEWM). AEWM and Sterling Financial Advisors are not affiliated companies.

Dan Ohlwiler CA Insurance License #0601944;AW07173188

Jason Ohlwiler CA Insurance License #0G35061