Educational Seminars Offered Through Means Wealth Management

About Means Wealth Management

Since 1935, individuals, families, businesses, and non-profits have worked with us to build wealth management strategies in support of their unique financial situations and goals. As a registered investment advisor, we have a strict fiduciary duty to always act in the best interest of our clients. As part of our commitment to the communities we serve, we offer educational seminars on a variety of financial topics. Below is a brief description of available programs.

Investment Basics

- Defining asset classes and categories.
- Understanding risk and return.
- Understanding asset allocation and diversification.
- Aligning investments with goals and a financial plan.

Retirement Planning

- What retirement planning means in today's world.
- Qualifying life events.
- How to plan for and through retirement.

Social Security

- Understanding what Social Security is and who qualifies for benefits.
- When and how to file for benefits.
- Incorporating Social Security into your overall retirement and financial plan.

Medicare

- Understanding what Medicare is and who qualifies for benefits.
- When and how to file for benefits.
- Understanding and selecting a Medicare Supplement or Medicare Advantage plan.

What Should You Be Asking Your Advisor?

- How do financial professionals work with clients (standard of care)?
- How financial advisors are compensated.
- Understanding different investment vehicles and their costs.
- Other questions you should be asking.

Estate Planning

- What is probate and how to avoid it?
- Who makes decisions if I become incapacitated?
- Strategies to minimize taxes and expenses for heirs.

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Registered Investment Advisor

Guided by experience. Invested in you.

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