



Client Workshop Topics

Providing financial education through client workshops can be a good strategy to find new prospects and contacts to grow your business. Below you'll find a list of available workshop presentations.

Retirement Planning

- Getting the Most from Social Security (MM4787Q)
- Medicare: What You Don't Know and What it Could Cost You (MM5944)
- Principal® Select Reward Plan (BB10332) - For business owners
- Retirement Savings Vehicles (PD440)
- Shifting Gears (PD882)

Financial Planning

- Debt Reduction (PD439)
- Employee Financial Resource ProgramSM
 - For use with employers (BZ1178)
 - For use with employees (BZ1179)
- Empowering Women with their Finances (BB10298)
- From Here to SecuritySM
 - Life Insurance (BB10008)
 - Disability Insurance (DI8511)
- Get FRANK with Your Money (BB11213)
- How Parents can be Good Financial Role Models (BB10022)
- Making Cents (BB11243) - For young professionals
- Saving for College 101 (BB10023)
- Special Needs Planning (BB10673)
- Your Path to Financial Security (BB11147)

Estate Planning

- Eight Key Steps to Estate Planning (PD529)
- Farm and Ranch Legacy Planning (BB10368)

Disability Insurance

- Income Protection Planning with the From Here to Security Program (DI8511)
- Retirement Savings Protection with DI Retirement Security (DI8610)
- Disability Buy-Out: Planning for the Future of Your Business (DI2160)
- Disability Insurance and Business Owners' Triple Threat
 - DI, OE and DBO (DI8852)
 - DI, OE, DBO, KPR and business loan protection (DI8853)
- Importance of Key Person Replacement Coverage (DI2332) - For business owners
- Overhead Expense Protection for Business Owners (DI2159)
- Overhead Expense and Business Loan Protection for Business Owners (DI2333)
- Enhancing Benefit Programs by Offering Disability Protection with Individual DI (DI8565)
- Enhancing Benefit Programs by Supplementing Group LTD Coverage (DI8537)
- Integrated Employee Benefit Solutions with Group LTD and Individual DI insurance (DI2161)
- Salary Continuation and Disability Insurance (DI2192) - For employers (employee benefits)
- Offering Business Loan Protection through Financial Institutions (DI8869) - For banks

Business Planning

- Big Challenges for Growing Businesses (BB10543)
- Exit Planning for Business Owners (BB10299)
- Principal® Select Reward Plan (BB10332)
- Valuing Your Business (BB10842)

A comprehensive package of support materials is available for these workshops:

- Customizable invitations
- Scripted presentations with recommended handouts
- Follow-up email
- Evaluation form - get immediate feedback and encourage an individual meeting

All materials can be found on our financial professional website.



WE'LL GIVE YOU AN EDGE®

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