

MAXIMIZING YOUR SOCIAL SECURITY BENEFITS

This educational workshop will help you:

- ✓ Learn how NEW legislation changed Social Security claiming options
- ✓ Maximize your Social Security payments
- ✓ Understand how Social Security affects your spouse
- ✓ Understand how Social Security taxation affects you
- ✓ Plan appropriately for retirement income
- ✓ Develop a tax-efficient retirement

About Your Instructor:



Ross Wolf - IAR, CLU, ChFC

Ross has more than 30 years of experience in Estate and Retirement planning and has been an educator for more than 10 years. He is Owner and CEO of his own nationwide firm. Ross has a B.A. degree in Finance from Florida State University and earned his CLU (Chartered Life Underwriter) and ChFC (Chartered Financial Consultant) designations from The American College in Pennsylvania.

Guest Speaker:



Eli Mizrahi

Eli Mizrahi is an Investment Advisor Representative and President at Pacific Group Advisors. He is licensed as a Fiduciary (Series 65). Eli uses common sense and problem solving rather than product selling while helping the families he works with retire with dignity and has been working with retirees and people aspiring to retire since 1983. Eli was born and raised in Israel, where after his mandatory service in the Israeli Defense Forces, he met his wife, Madeleine, who is from Bellevue, Washington, after he completed his service and finished a second period of time as a volunteer in a Kibbutz. Madeleine and Eli have made their home in Washington state since 1981. They have two adult children. They support cancer research, enjoy traveling, the movies, dining, hiking, biking, reading, and spending time with their family and friends. Eli earned a black belt in Shudokan Karate as well as a second-degree black belt in Hapkido and finds the lessons learned in his Marshall Art disciplines to be helpful while assisting the families he works with through retirement and life events.

EDUCATIONAL WORKSHOP ON MAXIMIZING SOCIAL SECURITY BENEFITS

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2/30/21

Join us for a FREE EDUCATIONAL WORKSHOP

This educational event will cover the latest strategies to coordinate Social Security Benefits, minimize taxation, and maximize Social Security Income.

MAXIMIZING SOCIAL SECURITY BENEFITS

University of
Washington - Bothell

In Commons Hall Classroom 005

11136 NE 180th St.
Bothell, WA 98011

Tuesday, **May 28** 6:30pm-7:30pm
or
Thursday, **May 30** 6:30pm-7:30pm

See inside for workshop and registration details.

Educational Workshop Highlights

- Recent legislative changes to Social Security benefits.
- Strategies to maximize Social Security payments.
- How to reduce or potentially eliminate taxes on your Social Security benefits.
- Ways that working can affect your benefits and their taxability.
- Certain types of earnings and pensions and how they could affect your benefits.
- Married? Learn how to coordinate benefits with your spouse.
- Tax reform may change your retirement plan. Find out what's new and the biggest mistakes to avoid.

EDUCATIONAL WORKSHOPS FILL QUICKLY, RESERVE TODAY!

WHEN AND WHERE

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Did You Know?

- **90%** of all recipients do not maximize their Social Security benefits. (NSSA) Mar. 21, 2023.
- **79%** of aged beneficiaries received at least half of their income from Social Security in 2015. (SSA, 2021)
- **55%** of adult Social Security beneficiaries in 2022 were women. (SSA, 2023)

TWO EASY WAYS TO REGISTER



To register by phone, please call:

800-755-4849



To reserve your seat online, please visit:

myrsvp.biz/?id=257409



SOCIAL SECURITY EDUCATIONAL WORKSHOP OVERVIEW

If you're among the millions of Americans who are currently collecting, or planning to file for Social Security benefits, one of the most confusing but important elements of retirement planning is understanding how Social Security works. About half of retirees apply for Social Security as soon as they become eligible at age 62, but by doing so, they may significantly and permanently impact their lifetime income and benefits. The difference between the best and worst possible decision of when to start Social Security can exceed \$100,000! This important workshop will provide you with the latest information on important new rules and legislation that can affect the amount of retirement benefits you collect, as well as strategies for coordinating Social Security with other sources of retirement income.

CUSTOM SOCIAL SECURITY TIMING® REPORT



All attendees are eligible to receive a **FREE** personalized Social Security Timing Report!



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