



Gates Matchmaker Financial Education & Consulting

BAIRD

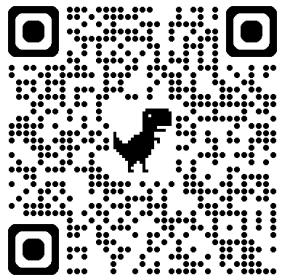
DENVER: On-site Individual One-on-One Meetings

March 10th & 11th

Rochester Hills & Englewood Meeting Rooms

20 Minutes each

Please Scan here to sign-up for your one-on-one meeting



Rochester Hills
Meeting Room
w/Dan Buxton

Englewood
Meeting Room
w/Dan Corbett



Gates has partnered with Baird to offer financial education services

How Baird Can Help

- Establishing a long-term financial plan to help guide you to and through retirement
 - Wealth report and planning tool to help determine if you are on track for retirement
 - Are you invested correctly based on your goals
 - Market commentary: making sense of the headlines
 - ROTH vs. Traditional contributions, which one is right for you
 - Social Security analysis and education
 - Ideas for generating income
 - A review of your current 401(k) Plan:
 - Investment allocation
 - Are you contributing enough
 - Are you maximizing the employer offered benefit
 - Open Q&A

Presented By:



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