



IS IT TIME FOR YOU TO COLLECT YOUR SOCIAL SECURITY
OR TIME TO BEGIN PLANNING??

BE SURE YOU HAVE ALL OF THE FACTS BEFORE YOU DECIDE

***THERE CAN BE A SIGNIFICANT INCOME DIFFERENCE
DEPENDING ON YOUR DECISION***

MAKE PLANS TO ATTEND A
SOCIAL SECURITY PLANNING WORKSHOP

PRESENTED BY: JIM GREENE

Virtual Meeting

Wednesday, July 15, 2020
Wednesday, October 7, 2020
Wednesday, February 10, 2021

5:00 PM to 6:30 PM

Topics to be discussed include:

- 1) Five factors to consider when deciding when to apply for benefits.
- 2) When it makes sense to delay benefits – and when it does not.
- 3) Why you should always check your earnings record for accuracy.
- 4) How to estimate your benefits.
- 5) Strategies for coordinating benefits with your spouse.
- 6) How to minimize taxes on Social Security benefits.
- 7) How to coordinate Social Security with your other sources of retirement income.

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