Blue Hills Wealth Management
Lunch & Learn Sessions

Choose from:

Financial Preparedness

- ❒ **Financial Management**
  A basic crash course in some of the fundamentals of financial planning. Cash Management, Managing Taxes, Saving for Retirement, Leaving a Legacy
- ❒ **Retirement Investment Strategies**
  Focused specifically on the issues we face upon retirement such as Taxes, Portfolio Management, Outliving Retirement, Investment Objectives
- ❒ **Investment Fundamentals**
  An investment oriented discussion of some of the success factors of investing including Myths of Investing, allocation models, tax deferral, bonds, mutual funds, Dollar cost averaging.
- ❒ **Estate Conservation**
  Focuses on fundamentals of estate conservation, challenges to estates, distribution techniques, and trust strategies including celebrity wins and woes.

"Life on Purpose Education Series"SM

- ❒ **Planning for Your Housing**
  Do you have a plan for where to live for the next 5,10, 20+ years? Have you thought about the Lifestyle, Financial, Emotional, Family and Health considerations tied to these choices? As we live longer, where are the trends leading us?
- ❒ **Brain Medicine: Travel and Learning**
  Mental exercise, learning new things or pursuing activities that are intellectually stimulating has been shown to strengthen brain cell networks and help preserve mental functions. So what can you do- and where can you go? Review unique travel options in a social media world.
- ❒ **Rightsizing; Simplifying stuff and Maintaining Memories**
  You say, "Why do I have all of this stuff?" only to take a few looks and find it hard to let go of that special family heirloom. Take a dive into the motivations of collecting, and how to dig yourself out before someone else has to.
- ❒ **Your Legacy: Transitioning Wisdom and finances to the next generation**
  There is a true art to preserving your human and intellectual capital, as well as your financial assets. Perhaps you will pass wealth to the next generation or perhaps not – but what values and traditions will you pass on?

Including setup and breakdown, sessions are designed to last 1 hr. 15 minutes. The presentations are condensed into a 55 minute session including Q&A. The company will usually provide a light buffet lunch to facilitate doing it over the lunch hour. Cost: $100 per session covers handouts and other expenses. Company benefit customization is available free of charge.