

# Client Events From MFS®



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Hosting an event is a great way to build stronger relationships with your clients and attract new prospects. Here is a list of our offerings.



## Today's Market

### Market Insights: Beyond the Headlines

Markets have become increasingly complex. Add in the daily news headlines, and it's easy to see why clients get confused. Our Market Insights seminar can help your clients distinguish information from noise by offering a fair and balanced overview of global equity and fixed income markets, as well as the global economy.

#### TARGET AUDIENCE

Clients or prospects interested in understanding the current macro environment

### Principles of Long-Term Investing Resilience

Market volatility may lead to client anxiety and poor investment decisions. This seminar may help keep your clients on track toward their goals, control their emotions and understand market volatility by focusing on the features and potential benefits of a long-term view, diversification and proper allocation.

#### TARGET AUDIENCE

Clients or prospects anxious about volatility or at risk of selling out in a market downturn

### Lessons Learned From 100 Years of Investing

Today's investors face many challenges — like volatility, changing interest rates and global uncertainty. In 100 years of investing, MFS has experienced these and other challenges, and along the way, we've learned many lessons. In this seminar, we share six of them. They can potentially help your clients gain new insight into investing and put market challenges into perspective so they can pursue their goals.

#### TARGET AUDIENCE

Clients or prospects who are worried about facing market challenges and want to gain insight on how to reach their investing goals



See the reverse side for additional offerings.

## Events from MFS® for Your Clients



### Investing and Financial Fundamentals

#### Calm, Cool and Invested

A well-crafted plan can help clients stay on track to pursue their financial goals. This seminar offers clients critical tips for investing for the long term and keeping their emotions in check, especially through volatile markets. It also shows clients how partnering with a financial professional can help them develop a financial plan aligned with their goals and risk tolerance, which can help them stick to their plan over time.

##### TARGET AUDIENCE

Clients or prospects who want to understand more about the fundamentals of planning and working with an investment professional



### Wealth and Financial Strategies

#### Generational Wealth: Understand, Plan and Communicate\*

Family wealth transfers sometimes fail, damaging sibling relationships and affecting the impact you want your assets to have. This seminar helps clients understand why family wealth transfers can fail, how to avoid mistakes and how open communication between family members may lead to successful transfers of wealth.

##### TARGET AUDIENCE

Clients with adult-age children or clients with older parents who may be prospects

#### Savvy Women, Smart Investors\*

Women today face unique financial pressures, whether they are raising a family, caring for parents or saving to meet their own long-term goals. Our Savvy Women seminar explores some of the challenges unique to women and the impact these challenges can have. This information can help your female clients make informed decisions and plan accordingly for their financial future.

##### TARGET AUDIENCE

Existing clients or referrals from existing female clients

See the reverse side for additional offerings.

## Events from MFS® for Your Clients



### Retirement Planning

#### Road Map to Retirement: Top IRA Planning Mistakes to Avoid\*

Commonly made IRA planning mistakes put clients' retirement plans in jeopardy and threaten client-advisor relationships. This seminar can help your clients avoid these common mistakes so that they can make the most of their IRA savings. We'll focus on problem areas, including beneficiary designations, spousal inheritance options and issues related to IRAs, Roth IRAs and required minimum distributions (RMDs).

##### TARGET AUDIENCE

Midcareer clients or prospects looking to avoid issues as they near retirement or preretiree clients or prospects looking to make adjustments as they approach retirement

#### Social Security: Preparing for Retirement\*

Social Security claiming strategies can be complex. This seminar discusses important claiming considerations as they relate to clients' plans for retirement and how working with investment and tax professionals may help put everything into perspective.

##### TARGET AUDIENCE

Preretiree clients or prospects looking to understand their options as they consider their overall retirement income picture

#### Navigating Some Dos and Don'ts of Wealth Building

Building wealth can be a lifelong journey, and, like life itself, there are stages to building wealth. This seminar guides your clients through each stage, exploring actions they can take and missteps to avoid, helping them pursue wealth that may last a lifetime or beyond.

##### TARGET AUDIENCE

Clients and prospects at any stage of life that want to learn more about how to accumulate and build wealth for retirement and as a possible legacy

#### Making the Most of Medicare: What You Need to Know\*

Medicare is a complex topic that can have a lasting impact on retirement. This seminar walks clients and prospects through the coverage and costs of Medicare Parts A, B and D, and explores the differences between Medicare Advantage and Medigap plans. It also reviews what to consider when applying for Medicare. Helping your clients navigate this important stage of retirement is a critical aspect of your practice and a powerful way to demonstrate your value.

##### TARGET AUDIENCE

Clients or prospects who want to better understand Medicare cost and coverage

See the reverse side for additional offerings.

## Events from MFS® for Your Clients



### Lifestage Planning

#### Life Lessons: 529 Savings Plans\*

Given the rising costs of tuition, clients with young children, or even grandchildren, are likely concerned about paying for future educational expenses. This Life Lessons: 529 seminar demonstrates smart ways your clients can save and explains why starting now is so important.

##### TARGET AUDIENCE

Clients or prospects that want to start saving for education for children or grandchildren

#### Stand Out: Resumé and Interview Tips to Help Get You Noticed

Finding a job can be overwhelming. Whether your clients are looking for their first job or have been out of the job market for a while, this seminar offers action steps to help them stand out and help set them up for success in their job search.

##### TARGET AUDIENCE

Clients or prospects with children who are getting ready to enter the workforce and those looking to change jobs or return to the workforce



### Unique and Specialty Topics

#### Protecting Your Data: Aware and Prepared\*

Your clients are looking for ways to limit risk in their financial life. Cyber security and awareness is a piece of that. This seminar covers the most common cyber threats and offers industry best practices to help clients better protect themselves, their family and their finances.

##### TARGET AUDIENCE

Clients or prospects that are concerned about the cyber landscape or have family members they want to protect

#### Things I Learned: A Caregiver's Journey\*

Caregiving often comes on suddenly without warning, guidance or support. During this seminar your client will discover practical ways to navigate and manage the emotional and financial demands of caregiving.

##### TARGET AUDIENCE

Clients or prospects who are caring for a loved one or know someone who will some day be a caregiver

Please check with your firm's Compliance Department before initiating events to verify that the activity complies with firm policy and industry rules.

Not all seminars may be approved at your firm. Please check with your firm's Compliance Department to confirm if approved for use.

\*Attendees of this seminar are eligible to receive CE credits when the seminar is presented by MFS®.

For additional presentations, contact your MFS® wholesaler or call us at 1-800-343-2829 for advisor business-building presentations.

**Keep in mind that all investments, including mutual funds, carry a certain amount of risk, including the possible loss of the principal amount invested.**

**MFS® does not provide legal, tax, accounting, Social Security or Medicare advice. Participants may want to consult their financial advisor or investment professional before making any decisions and may want to confirm any decision with a Social Security (1-800-772-1213) or Medicare (1-800-MEDICARE) representative. Clients of MFS should obtain their own independent tax and legal advice based on their particular circumstances.**

See the reverse side for additional offerings.

**No investment strategy can guarantee a profit or protect against a loss.**

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