

Join us for this two-day presentation on:

Retirement Readiness Workshop:

Social Security, Medicare, Estate Planning, and Taxes



Social Security

- Understanding social security claiming options for singles, couple's widowers and divorces
- Find out how working in retirement can impact your benefits
- Learn tax rules that apply to Social Security income

Medicare

- Understand how Medicare Parts A, B, C & D work together
- Learn about enrollment periods and how to avoid late penalties
- Find out what Medicare does and doesn't cover

Estate Planning

- How to get started creating or updating your estate plan
- Understand how to avoid probate

Taxes

- The 4 stages of retirement and important tax actions in each stage
- Mistakes to avoid when it comes to investments, health care, and estate planning

Tuesday, October 28th at 5:30pm &
Thursday, October 30th at 5:30pm

Tuesday, November 4th at 5:30pm &
Thursday, November 6th at 5:30pm

BUNDZA

WEALTH MANAGEMENT

1525 Herbert Street
Suite 104
Port Orange, FL 32129

Presented by: Justin Bundza, Senior Wealth Manager at Bundza Wealth Management
Seating is limited. Call today to reserve your spot: (386) 672-0871