



Hi {Firstname},

I'm sorry we missed you at the Taxes in Retirement workshop at the library last week. I know things can come up unexpectedly. We still ended up with a full house and spent an hour and a half going through a LOT of information.

I've attached the presentation slides and audience handouts to this email, but it isn't the easiest thing to comprehend without explanation.

[Taxes in Retirement Slides](#)

[Taxes in Retirement Handouts](#)

As part of enrolling in the class, you are entitled to a one-on-one session (phone, virtual or in-person) with me. About 70% of the attendees use this as a chance to see how tax planning, estate planning, and overall retirement income planning rules can be applied to their situation.

We only have 90 minutes together in class – so the one-on-one chat lets you apply the information and tactics we discuss to your personal situation. There is no obligation, no sales pitch, or anything like that. It's part of the class and what I agreed to do when they asked me to teach it.

Another benefit is you can request a complimentary Retirement Tax Analysis to take home and use as you wish. A number of attendees last week were referred from others specifically for this analysis. It is great info whether you are a do-it-yourself tax planner or already have an advisor that manages your investments.

My personal goal is we find at least one overlooked tax move that saves you enough money that you brag to your friends about it. Regardless you will leave with increased peace of mind.

If you'd like to set up a time to visit, and go through some of what you missed, you are still entitled to do so. Just respond back and let me know. We're happy to help!

You can also schedule a time on my calendar below.

Hopefully, we'll talk sometime soon.

Thanks!

Energized Retirement Planners

<http://www.energizedretirement.com>

[Schedule a Meeting or Call](#)



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