

... Plus *up to 14 additional benefits* the personalized **“Worry-Free Retirement” Review** identifies for you! If you’re not aware or have not been presented ANY of these benefits to which you may be entitled... you may benefit greatly from this review.

In my experience, it’s not the BIG things in life that “get you”... since you usually see THEM coming! Clients tell me that the real danger is often the SMALL things that seem to “come out of nowhere”... and suddenly become potentially *big financial problems* in retirement.

I am offering a complimentary personalized **“Worry-Free Retirement” Review** meeting for South Jersey area residents. **This is not a group seminar.** This is a personalized, private consultation where I will help you identify up to 21 benefits you’re owed and entitled to receive! This **FREE review focuses on things you can tweak or fix** to improve your financial position (like benefits you’re missing or issues you can easily correct)... **and not on things that you can’t** (like the direction of the markets or interest rates).

You’ve worked hard for your money and paid into the "system" for years... doesn't it make sense to identify benefits you're owed or otherwise entitled to receive? **Call 856-472-9299** to schedule an appointment to learn more or **schedule online at: [RockCrestFinancial.com/rsvp](http://RockCrestFinancial.com/rsvp)**

I look forward to meeting you!

Steven A Boorstein, PharmD, CFP®

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**Call us at 856-472-9299 to setup a meeting and learn more about the personalized “Worry-Free Retirement” Review or schedule a meeting using our online calendar below!**

This free, no-cost review can identify up to 21 important benefits you are owed or entitled to receive! As a sincere ‘thank you’... after we’ve presented you with the “Worry-Free Retirement” Review (which includes a portfolio review), you’ll get a \$100 Gift Card good at Outback Steakhouse, Carrabba’s Italian Grill, Fleming’s Steakhouse and Bonefish Grill or a gift card to Amazon.com (your choice) for you to enjoy at your leisure. We look forward to meeting you and seeing if the “Worry-Free Retirement” Review is for you!

*\*There is absolutely no obligation or cost to attend. The number of appointments each month is limited. Offer may be withdrawn at any time. Limited to first time appointments; one per household. There is no obligation to use our financial planning or investment management services, nor will you be asked to buy anything at the review meeting. Offer limited to those with portfolios of \$50,000 or more in investable assets. If you don’t meet this criteria, we would still like to help and you may be offered a free, personalized review without the gift card offer.*