



STONEWOOD FINANCIAL FEATURING MARTY RUBY & BECKY SWANSBURG

OVERVIEW:

Market conditions and unknown future tax hikes have left many savers with uncomfortable decisions when it comes to retirement. Marty & Becky will share ways to help protect and position your retirement assets for long-term success — no matter what the future market and tax conditions may be.



OFFERINGS:

- Day and a half time commitment
- Ability to host up to 3 seminar events
- Training for producer(s) or team
 - Software training
 - Understanding IUL training
- Autograph/book signing
- Appearances on TV or radio shows if applicable

PRICING:

\$12,500 Fee* + Travel + Book Expenses

**Includes \$2,500 discount for AE producers*

DAVID MCKNIGHT

OVERVIEW:

There's a freight train bearing down on the average American investor, and it's coming in the form of higher taxes. During his presentation, David shares the risks of tax-deferred investing in a rising tax rate environment and lays out a step-by-step roadmap on how to work toward the zero percent tax bracket, potentially eliminating tax rate risk from your retirement picture.



OFFERINGS:

- 1 hour seminar presentation
- 2 hours of training for producer(s) and team
- Autograph/book signing
- Willing to appear on radio show for event promotion

PRICING:

\$10,000 Fee* + \$800 Travel + Book Expenses

**Includes \$1,000 discount for AE producers*



ED SLOTT



OVERVIEW:

If you are like most Americans, your most valuable asset is your retirement savings. People put money away diligently for years, yet many of us don't know how to avoid the costly mistakes that can occur when it comes time to use it. Ed shares how to take financial control, avoid unnecessary taxes and combat the latest risks to your retirement savings.

OFFERINGS:

- 1 hour seminar presentation
- Autograph/book signing
- Willing to appear on radio show for event promotion

Due to heightened regulatory scrutiny, not available for AEWM IARs and AEFS RRs.

PRICING:

\$15,000 Fee* + Book Expenses

**AE will pay \$2,500 of this fee + Ed's travel expenses for AE producers*

HON. DAVID M. WALKER FORMER COMPTROLLER GENERAL OF THE UNITED STATES



OVERVIEW:

America is at a critical crossroads, and there are real and growing threats to America's future, both internationally and domestically. These challenges, and the government's eventual response, will likely have significant implications for the country, every American and even the free world. As individuals, you need to consider these three major risks (investment, health status & longevity) and how to handle them.

OFFERINGS:

- 1 hour seminar presentation
- Autographs
- Willing to appear on radio show for event promotion

PRICING:

\$8,000 Fee + Travel Expenses + Whitepaper Printing Expenses

To check availability or to hear more about live events, email meettheauthor@advisorsexcel.com or reach out to your Life Marketing team for further details.