

The moment a person turns 62, one of his or her concerns is: “When should I file for Social Security?” Given the importance of Social Security benefits as a source of income for most retirees, it is critical to determine the most optimal way to file for benefits.



However, this is never a “one answer fits all” situation. Each person faces different circumstances and, as such, it must be treated independently. Factors such as a person’s age, marriage status, health, income history, desire to keep working and sources of additional income must be considered in the equation.

In an effort to help our clients consider the circumstances and determine their maximum benefit, we have incorporated Social Security planning as part of our services.

To introduce this service to our clients, we will be

hosting two **upcoming seminars on Thursday, November 6, 2014 at 6:30pm and Tuesday, November 11, 2014 at 6:30pm at The Country Inn restaurant in Warren, RI, with John F. Woodard, Jr., CPA as the presenter.** The seminar includes dinner and is free to anyone over the age of sixty (60).

Participants will learn some of the the little-known techniques to optimize Social Security benefits and be introduced to our exclusive benefits optimization tool. If you or someone you know could benefit from learning more about optimizing Social Security Benefits, please Contact us at (401) 433-5858 and we will reserve a seat. Because the purpose of the seminar is to have a thoughtful, inclusive discussion, we limit participation.

***Country Inn Restaurant
Warren RI***

The Country Inn Restaurant is a full-service, family-oriented facility with charming appeal that prides itself on home-cooked favorites and **VERY** generous portions. The Country Inn is perfect for enjoying lunch, dinner meals with family or friends, and celebrating special occasions, holidays, and small banquets.

**Country Inn
Restaurant and Lounge**
382 Market Street
Warren, RI
401-245-8318

