

## Complimentary Financial Check-up!

We'd love to meet you. Talk to a branch associate to set up an appointment today.

with: \_\_\_\_\_  
financial advisor & phone number

on: \_\_\_\_\_  
date & time

at: \_\_\_\_\_  
branch address

Or give us a call at 888-570-0774 to schedule your appointment. You can also visit us online at: [liberty-bank.com/ComplimentaryFinancialCheck-Up](http://liberty-bank.com/ComplimentaryFinancialCheck-Up)

### Things we can talk about:

- Maximizing your IRA's and employer-sponsored retirement plans
- Setting savings and investment goals
- Saving for retirement
- Asset allocation, diversification, and consolidation
- Planning for income in retirement
- Understanding social security and Medicare
- Taxable versus tax-free investing
- Protecting your loved ones with insurance
- Creating and preserving a family legacy
- Long-term care options



INVESTMENT SERVICES

# **RAYMOND JAMES®**

Securities offered through Raymond James Financial Services, Inc., Member FINRA/SIPC and are not insured by bank insurance, the FDIC, or any other government agency, are not deposits, obligations of, or guaranteed by the Bank, and are subject to risks including the possible loss of principal. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Liberty Bank and Liberty Investment Services are not registered broker/dealers and are independent of Raymond James Financial Services.

315 Main Street  
Middletown, CT 06457