Beyond the Basics:More Than Just 403(b)s/457(b)s

FOR ALL YOUR INVESTMENT NEEDS



Wealth Planning Advisors Suite 200 21800 Burbank Blvd Woodland Hills, CA 91367

www.lincolninvestment.com

Advisory services offered through Capital
Analysts or Lincoln Investment, Registered
Investment Advisers.
Securities offered through Lincoln
Investment, Broker-Dealer, Member FINRA/
SIPC. www.lincolninvestment.com Wealth

Planning Advisors and the above firms are

independent, and non affiliated.

Finding the resources and discipline to invest regularly for retirement is challenging for many people. Knowing how to invest your money may present an even bigger challenge. That's why we recommend seeking the advice of a financial professional.

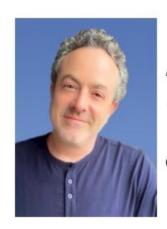
A financial professional can help you lay the groundwork for a successful investment plan tailored to your financial goals, risk tolerance and time frame, as well as recommend appropriate investments that can help you reach your retirement savings goals.

Your financial professional can provide presentations and advice on the following:

- » Comprehensive Financial Planning
 - Financial Counseling
 - Budgeting
- » Retirement Planning
 - 403(b) plans
 - 457(b) plans
 - Fixed and variable annuities
 - · Income strategies
 - Roth & traditional IRAs
- » Education Planning
 - 529 plans
 - Coverdell Education Savings Accounts
 - UGMA/UTMA
 - Loan forgiveness
 - Loan repayment planning

- » Asset Management Strategies
 - Estate planning
 - Professional portfolio management
- » Investments
 - Mutual funds
 - Tax-deferred and tax-sheltered accounts
 - Non-qualified investments
- » Insurance Planning
 - Life
 - Long-term care
 - Disability
 - Generational planning
 - Pension maximization strategies





David Levine
Financial Representative
(415) 450-6626

dlevine@lincolninvestment.com