

This Financial Planning Seminar
is sponsored by the
McLeod Foundation Professional Advisory Council

The Professional Advisory Council is composed of local estate planners, financial planners, life insurance agents and accountants. It provides a forum for professionals to share ideas and knowledge so they can better assist clients who would like to benefit charitable organizations such as the McLeod Health Foundation.

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McLeod Health
Foundation

For additional resources on Estate and Financial Planning, please visit www.McLeodFoundation.org and click on Planned Giving or contact Roxanna Tinsley at the McLeod Foundation, 843-777-2694 or send an email to rtinsley@mcleodhealth.org.

SOCIAL SECURITY

How well do you
understand your benefits?

If you are approaching retirement or are already there, you'll want to join us for this exclusive video presentation.



Wednesday, April 4, 2012
McLeod Health & Fitness Center
Florence, SC

McLeod Health
Foundation

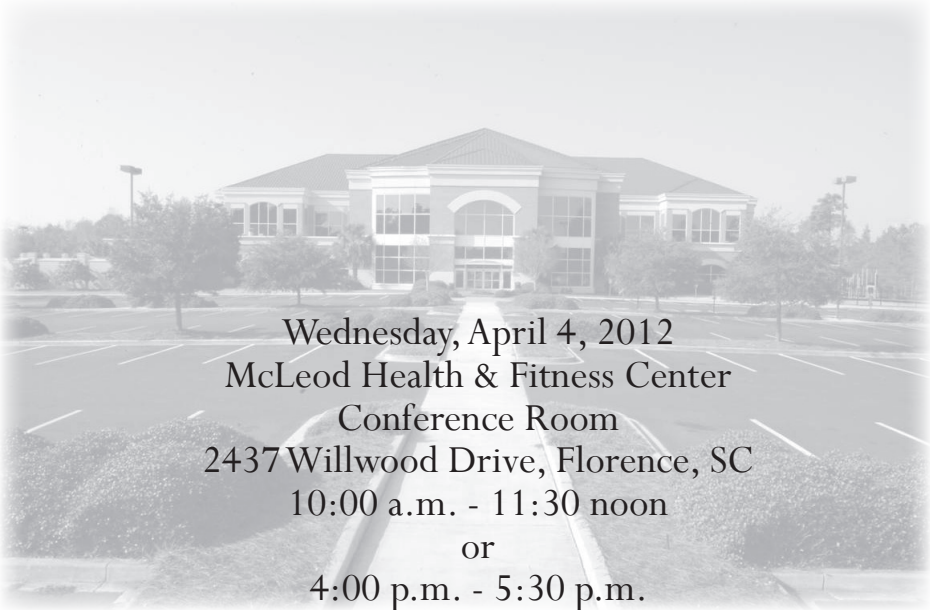
McLEOD HEALTH FOUNDATION FINANCIAL PLANNING SEMINAR

TOPICS AND SPEAKERS

The McLeod Health Foundation is proud to offer this informative seminar as a benefit to donors and supporters. We are most grateful to Wells Fargo Advisors for underwriting this event and for the members of the McLeod Foundation's Professional Advisory Council for their assistance.

There is no charge for attending the seminar but seating is limited so you are encouraged to register as soon as possible.

To register call the McLeod Foundation at 843-777-2694 or email Roxanna Tinsley rtinsley@mcleodhealth.org. Please be sure to specify which session you would like to attend.



Wednesday, April 4, 2012
McLeod Health & Fitness Center
Conference Room
2437 Willwood Drive, Florence, SC
10:00 a.m. - 11:30 noon
or
4:00 p.m. - 5:30 p.m.

Social Security and your retirement



Bill Hunot, Vice President
Wealth Management Support Specialist
Wells Fargo



Prior to joining Wells Fargo, Bill retired from the Social Security Administration after a 27-year career. He has a Bachelor's in History from the University of Missouri-St.Louis and hold Series 7 and Series 66 registrations. He is a frequent guest lecturer at colleges and universities.

- When you should begin taking Social Security benefits - early (age 62), at full retirement age or at age 70
- The effects that taking Social Security benefits early may have on your retirement income over time
- How wages, consulting fees and other income could affect the taxation of your Social Security benefits*
- Why it's important to understand the difference between the earnings limit and taxability of your Social Security benefits*

**Wells Fargo Advisors is not a tax or legal advisor.*

New Charitable Strategies to Reduce Taxes



James E. Connell, FAHP, CSA
Connell & Associates, Pinehurst, NC

- Jim will share some charitable gift options to reduce the impact of income tax liability.