

Life Stage Investing for Your Clients

At every life stage, your clients have competing priorities for how to spend their money. In their early working years, they may be focused on paying down college debt or saving for a mortgage. In the middle of their careers, they may be saving for their children's college education or remodeling their homes. And, as they near retirement, they may be more concerned about how to make their savings, Social Security, and other sources of income last for 20 or 30 years.

We have developed a set of value-add materials aimed at helping your clients understand their investment choices - no matter which life stage they are in.

- Save for the long term;
- Identify sources of retirement income and gaps;
- Understand Social Security options; and
- Explain health care decisions for when they become eligible for Medicare.

Our seminar and sales idea will help you engage with your clients and assist them in achieving their retirement goals regardless of their life stage.

[Read the Client Guide](#)

Related Value-Add Marketing Resources



Life Stage Investing seminar

A seminar advisors can give to clients about investing at different stages of life.

[Download the Presentation >](#)



Sales Idea - Life Stage Investing

A helpful guide for your clients on priorities for retirement savings throughout the different stages of their careers.

[Download the Sales Idea >](#)



Unlocking the Power of Connection

This guide for Financial Professionals will help your team better understand the approach and keywords they can use to connect effectively with clients of each generation.

[Download the Brochure>](#)

Shareable Content



Share "Life Stage Investing" with your clients.

[Email Your Clients](#)

Related Resources

- [Estate Planning for Clients With Special Needs Loved Ones](#)
- [Retirement Challenges for Women](#)
- [More Value Add Topics](#)

FINANCIAL PROFESSIONAL USE ONLY

Neither Security Benefit nor its affiliates are fiduciaries. This information is general in nature and intended for use with the general public. For additional information, including any specific advice or recommendations, please visit with your financial professional.

Annuities are issued by Security Benefit Life Insurance Company (SBL) in all states except New York. Services are offered through **Security Distributors**, a subsidiary of SBL, which is wholly owned by SBL Holdings, Inc. (Security Benefit).

Security Benefit, its affiliates and subsidiaries and their respective employees and/or representatives do not provide tax, accounting, or legal advice. Any statements contained herein concerning taxes are not intended as and should not be construed as tax advice, nor should they be used for the purpose of avoiding federal, state or local taxes and/or tax penalties. Please seek independent tax, accounting, or legal advice.