



CUNA MUTUAL GROUP

Social Security and Your Retirement

FROM: [REP NAME], [PROGRAM NAME] Representative
TO: [FINANCIAL INSTITUTION NAME] Customer [CUSTOMER EMAIL]
SUBJECT: Social Security and Your Retirement

Regardless of when you plan to retire, Social Security will likely be an important part of the road ahead. *But do you know the rules of the road when it comes to Social Security?* Determining when to begin benefits could be one of the biggest financial decisions you face, and there are key issues to consider. Here's an opportunity to attend a valuable educational virtual seminar on this important topic, at no cost and no obligation:

Social Security and Your Retirement September 8th at 6PM Eastern

During the virtual seminar, you'll find out more about your Social Security benefits and discuss the role they play when setting a clear direction for your financial future. You'll learn the answers to your Social Security questions, including:

- What are the rules for starting your Social Security benefits?
- How do spouses coordinate their benefits?
- Are there different routes to take that could potentially increase your benefits?
- How do you decide where Social Security fits within your retirement plans?

[Reserve your virtual seat.](#) ([Link to WebEx registration](#))

Space is limited so please make your reservations today. And give me a call at [REP PHONE] with any questions about the virtual seminar or contact me by email at [REP EMAIL]. I look forward to seeing you virtually!

[REP NAME]

[REP TITLE]

[PROGRAM NAME]

Located at: [FINANCIAL INSTITUTION NAME]

[ADDRESS]

[CITY], [STATE] [ZIP]

Phone: [REP PHONE]

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