



SAMPLE WEBINAR INTRO & OUTRO SCRIPT

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WEBINAR INTRO

Hi, and thanks for joining us today for a very timely discussion on taxes in retirement.

[Introduce yourself and your company. For example, "I'm Sally Smith, CEO of Smith Financial. Here at Smith Financial, we help savers across northwest Georgia save for retirement with confidence. As part of that mission, we partner with national experts to bring you unique insights on some of the top risks you could face in retirement."]

Today, we're going to look at everything happening in Washington – and how it could impact your retirement approach. If you've watched the news lately, you know Congress has been debating trillions of dollars in new tax and spending legislation.

And all of that spending could mean higher taxes are coming. Unnecessary taxes can be one of the BIGGEST expenses in retirement if not properly planned for – so that's what we're going to do today: get you prepared.

My special guests today are leading experts on tax and legislative risk in retirement and authors of the book "The New Holistic Retirement."

Becky Swansburg is a Washington insider who spent her career on Capitol Hill and in the White House.

[Depending on the webinar speakers you are using, choose the correct co-presenter below.]

Neil Wilding is an expert at emerging retirement risks - and how to help savers like you prepare.

Marty Ruby is an actuary and expert on managing risk in retirement.

You are in for a treat today - so get ready to learn why taxes could be one of your biggest risks in retirement - and what you can do about it.



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WEBINAR OUTRO

Thank you, Becky. We here at [\[Firm Name\]](#) are firm believers that you can't make informed decisions about retirement without... information!

As Becky mentioned, we have proprietary tools that help us analyze your potential retirement tax bill - and craft targeted strategies to reduce it.

Everyone in attendance today has the opportunity to meet with our team and get your complimentary, no-obligation tax analysis.

This report will show you what your potential tax bill may look like in retirement and what your savings could look like with a proper tax strategy in place. Sometimes this means saving hundreds of thousands of dollars over the lifetime of your retirement.

The first step is scheduling a quick introductory call. Use the scheduling link that should pop up on your screen. Our team will also reach out to answer any questions in the coming days and to see where you would like your free, no-obligation copy of The New Holistic Retirement sent.

Thank you all for your time. We look forward to meeting you and will connect with each of you very soon.