



DELIVER MORE VALUE FOR YOUR EMPLOYEES

INSIGHTS FROM A PROFESSIONAL FINANCIAL ADVISOR

For nearly two decades, Jon Baker, MSFS, CFP® has been delivering financial speaking engagements for Atlanta companies and organizations.

CUSTOMIZED FOR YOUR AUDIENCE

Financial stress affects the lives of many working Americans. Knowledge is power, so let's discuss how to alleviate some of that stress and provide clarity with an engaging and informative financial speaker. We believe that clarity leads to action, and action leads to results.

The presentation will be designed to fit the company's or organization's needs. For example, they can be held as a lunch-and-learn or as part of a company's work/life program.

POPULAR TOPICS

RETIREMENT PLANNING

This discussion revolves around retirement distribution strategies, including understanding Social Security and 5 ways to maximize benefits.

6 STEPS TO EFFECTIVE MONEY MANAGEMENT

Whether employed or in transition, this presentation provides guidance on how to use money efficiently and effectively.

TAX STRATEGIES

The main focus is tax strategies within investment accounts - both Pre-tax and Post-tax. We also focus on how to pass assets to the next generation.

HOW TO SCHEDULE A PRESENTATION



Call our office so we can collaborate on dates and topics that fit your needs.



jbaker@jbakeradvisor.com
770.392.8715
JBakerAdvisor.com

Jon is proud to have provided educational presentations for the following companies:



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