SEMINAR RESOURCES

Client Seminars From MFS®

mfs.com

Hosting a seminar is a great way to build stronger relationships with your clients and attract new prospects. Here is a list of our seminar offerings.

Today's Market

Market Insights: Beyond the Headlines

Markets have become increasingly complex. Add in the daily news headlines, and it's easy to see why clients get confused. Our Market Insights seminar can help your clients distinguish information from noise by offering a fair and balanced overview of global equity and fixed income markets as well as the global economy

TARGET AUDIENCE
Clients or prospects interested in understanding the current macro environment

Principles of Long-Term Investing Resilience

Market volatility may lead to client anxiety and poor investment decisions. This seminar may help keep your clients on track toward their goals, control their emotions and understand market volatility by focusing on the features and potential benefits of a long-term view, diversification and proper allocation.

TARGET AUDIENCE
Clients or prospects anxious about volatility or at risk of selling out in a market downturn

Lessons Learned From 100 Years of Investing

Today's investors face many challenges — like volatility, changing interest rates and global uncertainty. In 100 years of investing, MFS has experienced these and other challenges, and along the way, we've learned many lessons. In this seminar, we share six of them. They can potentially help your clients gain new insight into investing and put market challenges into perspective so they can pursue their goals.

TARGET AUDIENCE
Clients or prospects who are worried about facing market challenges and want to gain insight on how to reach their investing goals

See the reverse side for additional seminar offerings.

MFS®

Seminars from MFS® for Your Clients

Investing and Financial Fundamentals

Calm, Cool and Invested

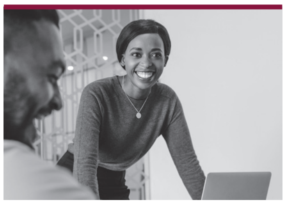
A well-crafted plan can help clients stay on track to pursue their financial goals. This seminar offers clients critical tips for investing for the long term and keeping their emotions in check, especially through volatile markets. It also shows clients how partnering with a financial professional can help them develop a financial plan aligned with their goals and risk tolerance, which can help them stick to their plan over time.

TARGET AUDIENCE
Clients or prospects who want to understand more about the fundamentals of planning and working with an investment professional

Figuring Out Your Credit Score

Understanding your credit score is one of the first steps in helping your clients build their financial literacy. Our Figuring Out Your Credit Score seminar explores how credit bureaus collect data and create credit reports and how credit scores are calculated and used. Importantly, the seminar shows clients how their actions can hurt or improve their credit scores.

TARGET AUDIENCE
Clients new to managing their finances and those with children in college or just entering the workforce



Wealth and Financial Strategies

Generational Wealth: Understand, Plan and Communicate*

Family wealth transfers sometimes fail, damaging sibling relationships and affecting the impact you want your assets to have. This seminar helps clients understand why family wealth transfers can fail, how to avoid mistakes and how open communication between family members may lead to successful transfers of wealth.

TARGET AUDIENCE
Clients with adult-age children or clients with older parents who may be prospects

Savvy Women, Smart Investors*

Women today face unique financial pressures, whether they are raising a family, caring for parents or saving to meet their own long-term goals. Our Savvy Women seminar explores some of the challenges unique to women and the impact these challenges can have. This information can help your female clients make informed decisions and plan accordingly for their financial future.

TARGET AUDIENCE
Existing clients or referrals from existing female clients

See the reverse side for additional seminar offerings.

Seminars from MFS® for Your Clients

Retirement Planning

Road Map to Retirement: Top IRA Planning Mistakes to Avoid*

Commonly made IRA planning mistakes put clients' retirement plans in jeopardy and threaten client/advisor relationships. This seminar can help your clients avoid these common mistakes so that they can make the most of their IRA savings. We'll focus on problem areas, including beneficiary designations, spousal inheritance options and IRA, Roth IRA and RMD issues.

TARGET AUDIENCE
Midcareer clients or prospects looking to avoid issues as they near retirement or preretiree clients or prospects looking to make adjustments as they approach retirement

Social Security: Preparing for Retirement*

Social Security claiming strategies can be complex. This seminar discusses important claiming considerations as they relate to clients' plans for retirement and how working with investment and tax professionals may help put it all in perspective.

TARGET AUDIENCE
Preretiree clients or prospects looking to understand their options as they consider their overall retirement income picture

Navigating Some Dos and Don'ts of Wealth Building

Building wealth can be a lifelong journey, and as with life, there are stages to building wealth. This seminar walks your clients through each stage, exploring actions they can take and missteps to avoid to help them pursue wealth that may last a lifetime or beyond.

TARGET AUDIENCE
Clients and prospects at any stage of life that want to learn more about how to accumulate and build wealth for retirement and as a possible legacy

Making the Most of Medicare: What You Need to Know*

Medicare is a complex topic and can have a lasting impact on retirement. This seminar walks clients and prospects through the coverage and costs of Medicare Parts A, B and D and explores the difference between Medicare Advantage and Medigap plans. It also reviews what to consider when applying for Medicare. Helping your clients navigate this important stage of retirement is a critical aspect of your practice and a powerful way to demonstrate your value.

TARGET AUDIENCE
Clients or prospects who want to better understand Medicare cost and coverage

See the reverse side for additional seminar offerings.

Seminars from MFS® for Your Clients

Lifestage Planning

Life Lessons: 529 Savings Plans*

Given the rising costs of tuition, clients with young children, or even grandchildren, are probably concerned about paying for future educational expenses. This Life Lessons: 529 seminar shows your clients smart ways to save and why starting now is so important.

TARGET AUDIENCE
Clients or prospects that want to start saving for education for children or grandchildren

Stand Out: Resumé and Interview Tips to Help Get You Noticed

Finding a job can be overwhelming. Whether your clients are looking for their first job or have been out of the job market for a while, this seminar offers action steps to help them stand out and help set them up for success in their job search.

TARGET AUDIENCE
Clients or prospects with children who are getting ready to enter the workforce and those looking to change jobs or return to the workforce

Unique and Specialty Topics

Protecting Your Data: Aware and Prepared

Your clients are looking for ways to limit risk in their financial life. Cyber security and awareness is a piece of that. This seminar covers the most common cyber threats and offers industry best practices to help clients better protect themselves, their family and their finances.

TARGET AUDIENCE
Clients or prospects that are concerned about the cyber landscape or have family members they want to protect

Things I Learned: A Caregiver's Journey*

Caregiving often comes on suddenly without warning, guidance or support. During this seminar your client will discover practical ways to navigate and manage the emotional and financial demands of caregiving.

TARGET AUDIENCE
Clients or prospects who are caring for a loved one or know someone who will some day be a caregiver

Please check with your firm's Compliance Department before initiating events to verify that the activity complies with firm policy and industry rules.
Not all seminars may be approved at your firm. Please check with your firm's Compliance Department to confirm if approved for use.
*Attendees of this seminar are eligible to receive CE credits when the seminar is presented by MFS®.

For additional presentations, contact your MFS® wholesaler or call us at 1-800-343-2829 for advisor business-building presentations.

Keep in mind that all investments, including mutual funds, carry a certain amount of risk, including the possible loss of the principal amount invested.

MFS® does not provide legal, tax, accounting, Social Security or Medicare advice. Participants may want to consult their financial advisor or investment professional before making any decisions and may want to confirm any decision with a Social Security (1-800-772-1213) or Medicare (1-800-MEDICARE) representative. Clients of MFS should obtain their own independent tax and legal advice based on their particular circumstances.

No investment strategy can guarantee a profit or protect against a loss.

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