



**Martha's
Vineyard**

FINANCIAL GROUP

Summer Brown Bag Lunch Series

Presented by Martha's Vineyard Financial Group



Location: West Tisbury Fire Station, 452 State Road, West Tisbury
Time: 12:00 P.M. to 1:00 P.M.

Martha's Vineyard Financial Group invites you to attend our 2nd Annual Summer Brown Bag Lunch Series. Each week one of our staff members will present a topic. Ample time will be provided for questions & answers. A light lunch will be provided. No cost to attend. **Space is limited so please register early by calling Katie or Steve at 508-693-8850 or email us at mvsbfinancialgroup@mvpbank.com**

DATE

WEEKLY TOPIC

June 23

Basic Estate Planning

June 30

Asset Allocation and Building Your Portfolio

July 7

Investing for the Next Generation

July 14

Variable Annuities - Funding Your Future

July 21

What is a Trust and How it Can Benefit You

July 28

Retirement Planning

August 4

Women & Investing

August 11

Long-Term Care and Life Insurance Options

August 18

IRA's, Health Savings Accounts, & 529 College Savings Accounts

Products and services of Martha's Vineyard Financial Group are not FDIC-insured, and are not deposits or obligations of nor guaranteed by the Martha's Vineyard Savings Bank. These products are subject to investment risk, including possible loss of value.

Investment products and services are offered through INFINEX INVESTMENTS, INC. Member FINRA/SIPC. Insurance products are offered through Infinex Insurance Agency of Massachusetts, Inc. Martha's Vineyard Financial Group is a trade name of the bank. Infinex and the bank are not affiliated. Products and services made available through Infinex are not insured by the FDIC or any other agency of the United States and are not deposits or obligations of nor guaranteed or insured by any bank or bank affiliate. These products are subject to investment risk, including the possible loss of value.