Educational Seminar Programs

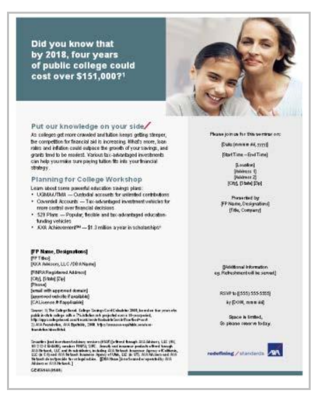
Powerful information can make an impact for life

AXA Advisors offers employers and associations financial seminars to empower their employees/members to potentially enhance their personal finances.

Seminar topics include:

- 15 Financial Myths Demystified
- 2-3-4 Financial Concept
- The ABCs of Variable Annuities
- Addressing Long-Term Care
- All About Life Protection
- AXA Achievement Program
- Charitable Giving: Crafting a Gift of Significance
- Charting a New Course: Employment Transition
- Enhancing Your Benefits with Pension Maximization
- Estate Planning Strategies
- Family Love Letter: Key to the Execution of Your Estate Plan
- Financial Strategies 101: Dollars and Sense
- Financial Strategies for the Gay and Lesbian Community
- Financial Planning for Success
- Is a Roth IRA Right For You?
- Meeting the Challenges Ahead
- Planning for College
- Planning Your Great Escape – Retirement
- Protection Strategies
- Retirement Plans for Small Business Owners
- Small Business Protection Strategies
- Social Security, Medicare, and Long-Term Care
- Strategies for Recovery: Getting Your Financial House In Order
- Women's Financial Beliefs
- World of AXA
- Your Family, Your Future

  … more



[15 Financial Myths Demystified](#)

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AXA ADVISORS

redefining / standards®

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This seminar serves to dispel 15 of the most common misconceptions people have about general financial strategies, retirement, investing, insurance, and estate planning. It also includes guidance on the strategies that can help people protect, and potentially enhance, their assets.

2-3-4 Financial Concept

This concept helps audiences understand how life insurance may fit into their planning needs and financial goals, and how taxes may impact accumulation and distribution of income.

The ABCs of Variable Annuities

This presentation gives an overview of variable annuities from the accumulation phase to the payout phase.
It explains the benefits of tax deferral in variable annuities, as well as the features and fees associated with variable annuities. It also includes case studies showing different scenarios of how variable annuities can be used to accomplish certain goals.

Addressing Long-Term Care

This seminar explains what Long-Term Care is, who needs it and what options people have if they need it.
The presentation emphasizes that, without proper planning, the potential costs associated with the need for LTC can be devastating to the family and to the assets built over the years.

All About Life Protection

Outlines the role of life insurance, the beneficial tax treatment of its cash value and different ways to calculate the amount of life insurance one needs. The seminar also reviews various types of life insurance and optional riders.

AXA Achievement Program

The seminar presents the AXA Achievement Program in the context of planning for college. The presentation covers the increasing cost of higher education and limited availability of financial aid. It then introduces the AXA Achievement Program as a source of scholarship support and provides useful information on strategies to plan and pay for a child's college education.

Charitable Giving: Crafting a Gift of Significance

This seminar presents various methods of tax-favored giving to charities, including the gifting of cash, appreciated securities, real estate and life insurance.
It also describes strategies and vehicles used for these gifts, including charitable trusts.

Charting a New Course: Managing Employment Transition

A presentation designed to help individuals who are on the verge of an employment transition by identifying areas that need to be addressed before and after the transition, such as severance payout options, payroll deductions, flexible spending accounts, health insurance, long-term care, etc.

Enhancing Your Benefits with Pension Maximization

Pension Maximization is a retirement planning strategy that can help secure a pension for a spouse and possibly increase income during retirement. This presentation reviews decisions required at retirement for pension plan assets, and how the strategy works.

Estate Planning Strategies

This seminar explains the estate planning process and discusses eight “smart” strategies for estate conservation and distribution. The presentation covers how a properly-created estate plan can help protect a family's financial well-being, preserve property, and reduce estate taxes and expenses as well as help avoid family conflict.

Family Love Letter

This seminar provides a basic overview of the Family Love Letter and its contents. The Family Love Letter seminar helps emphasize the importance of estate planning strategies if sudden incapacitation or death should occur.

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Financial Planning for Success

This seminar details the steps of the Financial Planning process. It examines some key questions an individual should consider when developing a financial strategy as well as the role of a Financial Professional in the planning process.

Financial Strategies 101 – Dollars and Sense

This seminar explains the advantages of smart financial management. The seminar reviews five financial management components: Cash Management, Risk Management, Estate Planning, Investment Strategies, Tax Reduction Strategies and Retirement Programs.

Financial Strategies for the LGBT Community

A seminar that addresses the planning needs of the LGBT community. It covers general strategies, as well as tools for handling the impact of regulatory differences

Is a Roth IRA Right for You?

A Roth IRA is a retirement account that can provide tax-free growth. This comprehensive Roth IRA tutorial is designed to help the audience take maximum advantage of an increasingly important retirement savings strategy.

Meeting the Challenges Ahead

A brief seminar that deals with the challenging times for public schools. It also highlights ways schools and teachers can maximize the benefits of their 403(b) plan.

Planning for College

A brief overview of the need to plan ahead for a college education and the types of planning vehicles available, including UGMA/UTMA, Coverdell savings accounts and 529 plans. The AXA Achievement Program is covered as well.

Planning Your Great Escape – Retirement

This seminar shows how to make the most of your asset building years, including getting retirement saving tax break you're entitled to. It also discusses maximizing the Social Security and Medicare benefits, as well as passing on more to heirs.

Protection Strategies

Financial protection products guard individuals and their families against the financial risk caused by life's uncertainties. The protection products explored in this presentation include: life insurance, disability income insurance and long-term care insurance.

Retirement Plans for Small Business Owners

This seminar discusses the retirement plan options available to business owners today. By exploring the benefits and considerations of each plan type, business owners can determine which plan may be the most appropriate for them and their employees.

Small Business Protection Strategies

This presentation discusses the main areas of risk for small businesses, the protection strategies to address the risks and tips on getting started.

Social Security, Medicare & Long-Term Care

This seminar provides helpful information about Social Security, Medicare and Long-Term Care. It discusses how they impact the ever-changing retirement environment.

Women's Financial Beliefs

(f.k.a.15 Financial Myths Demystified for Women)

Women have unique financial issues and needs. This seminar discusses 16 of the most common misconceptions women have about general financial strategies, retirement and estate planning, insurance, as well as money and relationships. It provides guidance on strategies to help women manage their finances.

World of AXA

This presentation can be used to introduce the audience to AXA Group's presence in the US. It covers AXA Group's global size and financial strength, looks at AXA Group's brands in the US and highlights the local presence of AXA Advisors in your neighborhood.

Your Family, Your Future

This presentation addresses the multitude of issues involved when juggling financial obligations of raising a family while still planning for your long-term financial future.