

Next Meeting: Thursday, June 20

June 2013

Speaker: David P. Zander

[UBS Financial Services](#)

Sponsored by:

- [Elmcroft of Quintessence](#)
- [Gail Rubin, "The Doyenne of Death"](#)

"Being Savvy on Social Security"

...making the most of social security benefits

By Linus Bosley, NMACC Board

Social Security. Just how sociable is it and does it provide security?

David P. Zander, a Certified Financial Planner, will help us all dispel the mysteries and complications of the Social Security benefit. Hopefully, when finished, we'll all have a better grasp of the monies we've put into this program—and how we can effectively benefit from them later.

Like it or not, Social Security is the foundation for most of our retirement savings plans. But honestly, many of us are unaware that the choices we make now can have a huge effect on our SS income in the future—for us and our loved ones.

Knowledge is power. If you are fifty or older, Mr. Zander's presentation is a must-see that can put thousands of dollars in your pocket. And even if you are not you will leave both smarter and with a leg up on your friends when that cocktail party conversation turns to Social Security Survivor Benefits, as it always does. This is an excellent presentation to share with others—parents, friends, and family—so don't hesitate to invite your middle-aged business contacts (and family members) to attend!

**Join [NMACC NOW](#) and receive a special, end-of-the-year rate.
This month is our Community Education Raffle: 1 ticket for \$2, 3 tickets for \$5
GUESTS ARE A MERE \$10 FOR THIS LUNCHEON ONLY!!!**

NMACC Partypacks: (open houses, social gatherings...)

- [Elmcroft of Quintessence](#) Open House Wednesday, June 12th, 4-7pm, [Sheila Williams](#), ED
- [Brookdale Place Valencia](#) "Special Appreciation" - June 21st, 2-5pm, [Roberta Stolpestad](#), Mtg. Dir.
- [Alzheimer's Association Kick Off Breakfast](#). [Teresa Burch](#)

NMACC Snacks: (non-profit events/causes...)

- [Join NMACC now!](#)
- [Stop Senior Hunger And Malnutrition](#). albuquerque-ne@comfortkeepers.com

NMACC Sac: (fast links to helpful educational tidbits)

- [Advance Directives in English and Spanish](#) from Presbyterian Healthcare Services
- [Albuquerque Department of Senior Affairs](#)

NMACC Almanac: (internal calendar)

July **NO MEETING!!!**

August 15, September 19, October 17, November 21, December TBD

NMACC to go is the board-approved E-newsletter of the New Mexico Association for Continuity of Care. Submissions are open to current members in good standing of NMACC. Send submissions to [NMACC To Go](#). The NMACC board and its designates are solely responsible for final content and editing. © 2013



Dave brings 36 years of financial industry experience to UBS Financial Services Inc. He is working with UBS Financial Advisors in Arizona, New Mexico and Central Texas helping them assist their clients and prospects in understanding not only Social Security Maximization Strategies, but integrating those benefits with their other assets with the goal of maximizing spendable income while reducing overall risk.

Over the last 12 years he has run both Aetna's and Lincoln National's Income Departments before starting his own firm Back Nine Financial 5 years ago. Prior to that time he has held positions as a life insurance agent, financial advisor, annuity and mutual fund wholesaler, divisional sales manager with various firms.

Dave, is a Certified Financial Planner, has spoken at a number of industry conferences, has written a number of articles for financial publications and trained thousands of advisors on retirement and income planning.

He is a graduate of the University of Wisconsin – Whitewater with a BBA with a major in marketing and a minor in accounting. Dave has been married for 26 years and has 2 children, a dog, a cat and 3 donkeys.

**"NMACC To Go" Submission
Deadline for July:**

Thursday, July 4th.

