INVESTRA • INTERNAL MARKETING TOOLKIT

His Golden Nest Eggs® & Her Golden Nest Eggs®

Ready-to-use campaign copy for financial planning, retirement consulting, wealth management, wealth transfer planning, and educational seminars.

HIS GOLDEN NEST EGGS®	HER GOLDEN NEST EGGS®
PRIMARY TERRITORY From accumulation to a coordinated retirement, wealth-management, and legacy plan.	PRIMARY TERRITORY Clarity, control, and coordination across retirement, life transitions, wealth management, and legacy decisions.

Recommended use

Use each mark as a consumer-facing pathway into InVestra's existing advisory process. Keep the standards of advice, disclosures, eligibility, and service access consistent. Audience segmentation should reflect relevance and expressed interests—not assumptions about gender.

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How to Use This Toolkit

The copy below is designed as an approved-copy starting point. Marketing can adapt channel length and design, but substantive changes should return through the applicable review workflow. Replace generic calls to action with the correct InVestra URL, phone number, scheduling link, and entity disclosures.

- Use the full registered mark on first/prominent reference.
- Pair the mark with a registered service descriptor whenever practical.
- Use audience-relevant examples without implying that men and women receive different advice, products, or standards of care.
- Archive dated final copies and live screenshots by mark, class, channel, and year.

HIS GOLDEN NEST EGGS®

Marketing Materials

“You built the nest egg. Now coordinate what it needs to do.”

1. One-Page Flyer / Handout Copy

FRONT-FACING COPY

RETIREMENT PLANNING • WEALTH MANAGEMENT • LEGACY

His Golden Nest Eggs®

Bring the pieces of retirement together.

You spent years accumulating. The next challenge is coordinating income, investments, taxes, family priorities, and the legacy you want your wealth to support.

What we can help you explore:

- Retirement-readiness and income planning
- How investments fit your broader financial plan
- Coordination of cash flow, taxes, and long-term goals
- Wealth-transfer and next-generation planning conversations

REQUEST A FINANCIAL PLANNING CONSULTATION

Suggested footer disclosure:

For informational and educational purposes only. This material is not a recommendation or guarantee of investment results. Financial planning and advisory services are provided only pursuant to the applicable engagement, agreements, and disclosures.

Seminar sidebar:

His Golden Nest Eggs® | Turning Accumulation Into a Retirement Plan

A practical educational session on retirement income, investments, planning priorities, and legacy decisions—and how those pieces can influence one another.

2. Landing Page Copy

HERO

His Golden Nest Eggs®

From accumulated wealth to a coordinated retirement plan.

His Golden Nest Eggs® is an InVestra planning and education platform designed to help you examine the decisions that come with turning savings and investments into a retirement and legacy strategy.

Primary CTA: Request a His Golden Nest Eggs® Financial Planning Consultation | Secondary CTA: Attend an Educational Seminar

The retirement shift

Accumulation answers one question: what have you built? Retirement raises several more: how will you create income, manage risk, coordinate taxes and liquidity, and preserve flexibility for family and legacy priorities?

One coordinated planning conversation

InVestra can help you examine retirement readiness, cash-flow needs, investment positioning, wealth-management priorities, and wealth-transfer questions as connected parts of a broader financial plan.

Education before decisions

Start with an educational guide or seminar. When individualized advice is appropriate, continue through InVestra's normal financial planning and advisory process with the applicable agreements and disclosures.

3. Three-Email Campaign

EMAIL 1

Subject: You built the nest egg. What comes next?

Preview: A retirement plan is more than an account balance.

Accumulating assets is one phase of the journey. Retirement introduces a different set of questions: How much income will you need? Which accounts should fund it? How should investments, taxes, family priorities, and legacy goals work together? His Golden Nest Eggs® brings those questions into one coordinated planning conversation.

Explore His Golden Nest Eggs® Financial Planning

EMAIL 2

Subject: Retirement income is a coordination problem

Preview: Income, investments, taxes, and legacy decisions are connected.

A strong retirement conversation looks beyond a single portfolio. It considers spending needs, income sources, investment structure, tax-aware planning opportunities, family priorities, and what you ultimately want your wealth to accomplish. Our His Golden Nest Eggs® educational resources are designed to help you identify the questions worth addressing before retirement decisions become urgent.

Download the Retirement Coordination Checklist

EMAIL 3

Subject: Join us: Turning accumulation into a retirement plan

Preview: An educational seminar from His Golden Nest Eggs®.

You may know what you have saved. The harder question is how all the pieces work together once work becomes optional. Join InVestra for an educational seminar on retirement income, investment coordination, planning priorities, and wealth-transfer conversations. The session is educational; individual recommendations can be addressed separately in a planning consultation.

Reserve your seat

4. Social Media Copy Bank

1	**A retirement account is not the same thing as a retirement plan.** A plan connects income needs, investments, taxes, family priorities, and legacy decisions. His Golden Nest Eggs® helps organize the conversation. **Learn more / Request a planning consultation**
2	**You know what you accumulated. Do you know how it will work together?** Retirement often shifts the question from "How much can I save?" to "How should I coordinate what I have?" **Explore His Golden Nest Eggs®**
3	**Three retirement questions worth asking before the retirement date.** Where will income come from? How should investments support withdrawals? What do you want your wealth to accomplish beyond your lifetime? **Download the checklist**

4

Retirement income decisions do not happen in isolation.

Withdrawal choices can affect investments, taxes, liquidity, and legacy priorities. A coordinated planning process looks at the connections.

Join an upcoming educational seminar

5

Legacy planning starts with a conversation.

Beneficiaries, family intentions, account structure, and professional coordination all matter. His Golden Nest Eggs® can help frame the questions.

Request a wealth-transfer planning discussion

6

One household. Many moving parts.

Retirement gets clearer when income, investments, planning priorities, and legacy goals are considered together.

Start a planning conversation

5. Seminar Campaign

EVENT TITLE

His Golden Nest Eggs®: Turning Accumulation Into a Retirement Plan

A financial planning and wealth-management seminar from InVestra.

For people approaching or living in retirement who want a clearer view of how income, investments, taxes, family priorities, and legacy decisions can fit together.

CTA: Reserve your seat / Register for the educational seminar

Suggested agenda

- From saving to spending: the questions that change in retirement
- Mapping retirement income sources and cash-flow needs
- How investment strategy fits a broader retirement plan
- Tax-aware planning considerations to discuss with your advisors
- Beneficiary, legacy, and next-generation planning questions
- A personal "next questions" worksheet for follow-up

Invitation copy

You have spent years building financial resources. This seminar focuses on what comes next: coordinating the decisions those resources now need to support. Join InVestra for a practical, educational discussion designed to help you identify the retirement and wealth-management questions worth addressing together.

Post-event follow-up

Thank you for joining His Golden Nest Eggs®. If the seminar surfaced questions about your own retirement income, investment coordination, or legacy priorities, you may request an individual financial planning consultation with InVestra. Personalized recommendations, if appropriate, are provided only through the applicable advisory process.

6. Advisor Talking Points

Conversation openers

- "You've done the accumulation work. Which retirement decisions feel least coordinated today?"
- "When you picture retirement income, do you see a clear plan for how the different accounts and income sources work together?"
- "Beyond retirement income, what do you want your wealth to support for family, giving, or the next generation?"

Consultation transitions

- "That sounds like a good fit for a broader financial planning conversation. We can map the pieces first and identify which decisions need deeper analysis."
- "The educational material gives us a framework; the next step would be an individual consultation where we can discuss your circumstances and determine whether InVestra's services are appropriate."

Avoid in unreviewed marketing

- "Protect your nest egg."
- "Never run out of money."
- "Guaranteed retirement income" unless describing a specific approved product accurately and with required disclosures.
- Any statement implying the brand itself produces superior performance or safety.

7. Lead Magnet / Guide

COVER COPY

His Golden Nest Eggs®

The Retirement Coordination Checklist

10 questions to ask when accumulated wealth needs to become a retirement, income, and legacy plan.

CTA: Download the guide / Bring it to a planning conversation

Suggested sections

- What are your expected retirement spending needs and timing?
- Which income sources are fixed, variable, or discretionary?
- Which accounts may fund near-term versus long-term needs?
- How does investment risk relate to withdrawals and liquidity?
- Which tax questions should be coordinated with a tax professional?
- Are beneficiary designations and estate documents aligned with current intentions?
- What family, charitable, or next-generation goals should influence the plan?
- What decisions depend on one another?
- Which issues require legal, tax, insurance, or other professional coordination?
- What are the next three planning actions—and who owns each one?

HER GOLDEN NEST EGGS®

Marketing Materials

“Clarity for the financial decisions that shape what comes next.”

1. One-Page Flyer / Handout Copy

FRONT-FACING COPY

FINANCIAL CLARITY • RETIREMENT PLANNING • WEALTH MANAGEMENT

Her Golden Nest Eggs®

Build clarity around the wealth you’ve worked to create.

Retirement and wealth decisions often arrive together. A coordinated plan can help you see how income, investments, family priorities, life transitions, and legacy goals connect.

What we can help you explore:

• Retirement-readiness and income planning

• Financial planning through major life transitions

• How investments support your broader goals

• Legacy, beneficiary, and wealth-transfer planning conversations

REQUEST A FINANCIAL PLANNING CONSULTATION

Suggested footer disclosure:

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Seminar sidebar:

Her Golden Nest Eggs® | Coordinating Retirement, Wealth & Legacy

An educational session for organizing the financial questions that often intersect around retirement and major life transitions.

2. Landing Page Copy

HERO

Her Golden Nest Eggs®

Clarity, control, and coordination for the decisions ahead.

Her Golden Nest Eggs® is an InVestra planning and education platform for exploring retirement, wealth-management, and legacy decisions in one coordinated conversation.

Primary CTA: Request a Her Golden Nest Eggs® Financial Planning Consultation | Secondary CTA: Attend an Educational Seminar

When financial decisions overlap

Retirement, career changes, inheritance, family responsibilities, widowhood, divorce, business transitions, and legacy planning can create connected financial questions. A coordinated process helps identify what changed, what matters now, and what needs attention next.

See the whole picture

InVestra can help organize retirement income, investments, cash flow, wealth-management priorities, and wealth-transfer questions into a broader financial planning framework.

Your priorities lead the conversation

The brand is a pathway into InVestra's established planning process. Start with education and discovery; move to individualized recommendations only through the appropriate advisory engagement and disclosures.

3. Three-Email Campaign

EMAIL 1

Subject: Your wealth deserves a plan as coordinated as your life

Preview: Connect retirement, investments, family priorities, and legacy.

Financial decisions rarely arrive one at a time. Retirement, career changes, family responsibilities, inheritance, widowhood, divorce, and legacy questions can overlap. Her Golden Nest Eggs® creates a structured way to bring those decisions into one financial planning conversation—so you can see what connects, what needs attention, and what comes next.

Explore Her Golden Nest Eggs® Financial Planning

EMAIL 2

Subject: Five questions that can create more financial clarity

Preview: Start with the questions, not the products.

What income will you need? Which financial decisions feel unresolved? How do your investments support your goals? Are beneficiary and legacy intentions coordinated? What would make you feel more prepared for the next transition? Her Golden Nest Eggs® resources are designed to help organize those questions before a planning conversation.

Download the Financial Clarity Checklist

EMAIL 3

Subject: Join us: Coordinating retirement, wealth, and legacy

Preview: An educational seminar from Her Golden Nest Eggs®.

Join InVestra for an educational conversation about the financial decisions that often intersect in retirement and major life transitions. We'll discuss retirement readiness, income planning, investment coordination, and legacy questions—with time to identify the issues you may want to explore in an individual planning consultation.

Reserve your seat

4. Social Media Copy Bank

1	**Financial clarity starts by seeing the whole picture.** Retirement, investments, family priorities, life transitions, and legacy decisions are often connected. Her Golden Nest Eggs® helps bring them into one conversation. **Explore Her Golden Nest Eggs®**
2	**A life transition can change more than one financial decision.** Career changes, inheritance, divorce, widowhood, retirement, or family responsibilities may affect cash flow, investments, taxes, and estate coordination. **Download the Financial Clarity Checklist**
3	**Start with the questions—not the products.** What matters now? What could change? What decisions are unresolved? What does your wealth need to support? **Request a financial planning conversation**

4

Retirement readiness is personal. The planning process should be disciplined.

A coordinated plan can connect income needs, investment strategy, family priorities, and legacy intentions without losing sight of what matters to you.

Join a Her Golden Nest Eggs® seminar

5

Your legacy plan is more than documents.

It begins with clear intentions, beneficiary coordination, family conversations, and alignment among your financial and legal professionals.

Explore wealth-transfer planning

6

Confidence is not a promise of outcomes—it is clarity about the plan.

Her Golden Nest Eggs® focuses on organizing decisions, tradeoffs, and next steps so you can have a more informed planning conversation.

Learn more

5. Seminar Campaign

EVENT TITLE

Her Golden Nest Eggs®: Coordinating Retirement, Wealth & Legacy

A financial planning and wealth-management seminar from InVestra.

For people who want a clearer framework for retirement and wealth decisions—especially when several financial priorities or life changes are happening at once.

CTA: Reserve your seat / Register for the educational seminar

Suggested agenda

- The financial questions that often converge around retirement
- Creating a clear picture of income, cash flow, and financial resources
- Connecting investment decisions to broader planning goals
- Planning through major life transitions without losing the bigger picture
- Beneficiary, estate-coordination, and wealth-transfer conversations
- A personal “financial clarity” worksheet for follow-up

Invitation copy

Financial decisions rarely arrive neatly, one at a time. Join InVestra for a practical educational seminar designed to help you organize retirement, investment, family, and legacy questions into a clearer planning framework.

Post-event follow-up

Thank you for joining Her Golden Nest Eggs®. If the seminar helped identify unresolved questions about your own retirement, investments, life transition, or legacy priorities, you may request an individual financial planning consultation with InVestra. Personalized recommendations, if appropriate, are provided only through the applicable advisory process.

6. Advisor Talking Points

Conversation openers

- "What financial decision is taking the most mental space right now?"
- "Have any life changes caused you to rethink retirement, cash flow, investments, or family priorities?"
- "If we could create clarity around three financial questions over the next year, which three would matter most?"

Consultation transitions

- "Those questions are connected enough that it may be useful to map them together in a financial planning consultation."
- "We can begin by organizing priorities and information; then, if appropriate, move into individualized planning or advisory recommendations through InVestra's normal process."

Avoid in unreviewed marketing

- "Women invest differently" or other generalized gender claims unless specifically substantiated and approved.
- Fear-based language about divorce, widowhood, dependence, or financial inadequacy.
- "Financial confidence guaranteed" or similar promised emotional/outcome claims.
- Any suggestion that Her Golden Nest Eggs® is a different or lesser advisory service than InVestra's standard process.

7. Lead Magnet / Guide

COVER COPY

Her Golden Nest Eggs®

The Financial Clarity Checklist

10 questions for coordinating retirement, life transitions, wealth management, and legacy decisions.

CTA: Download the guide / Bring it to a planning conversation

Suggested sections

- What has changed in your life or financial picture in the last 12–24 months?
- Which financial decisions feel unresolved or disconnected?
- What do you need your income and assets to support now and later?
- How do current investments connect to those goals and time horizons?
- Are cash reserves and liquidity appropriate for upcoming decisions?
- Which tax questions should be coordinated with a tax professional?
- Are beneficiaries, estate documents, and family intentions aligned?
- Who else—attorney, CPA, insurance professional, family member—needs to be part of the conversation?
- What would “more clarity” look like six months from now?
- What are the next three planning actions—and who owns each one?

Bonus: Paired Household Campaign

SEMINAR / HOUSEHOLD CAMPAIGN

His Golden Nest Eggs® + Her Golden Nest Eggs®

One Household. One Coordinated Retirement Plan.

An educational InVestra seminar on aligning retirement income, investments, planning priorities, and wealth-transfer conversations across a household.

CTA: Register together or request a household planning consultation

Use this paired execution when the audience is couples/households or when InVestra wants to demonstrate that the two marks lead into one consistent planning process rather than separate "his" and "her" financial advice.

Campaign Release Checklist

Run each finished asset through InVestra's applicable legal/compliance workflow before public use. This checklist is intentionally practical rather than jurisdiction-specific.

- ☐ Exact mark used: "His Golden Nest Eggs®" or "Her Golden Nest Eggs®"; ® appears only with registered services.
- ☐ Mark is paired with a clear generic descriptor when practical (e.g., Financial Planning Consultation, Retirement Planning Seminar).
- ☐ Sponsoring legal entity and advisor identity are clear where required.
- ☐ No guarantee, safety, certainty, "protected nest egg," or similar outcome implication.
- ☐ No performance claim, testimonial, endorsement, ranking, hypothetical result, or product recommendation unless specifically approved and supported.
- ☐ Educational seminar copy remains educational; individualized recommendations are moved into an appropriate consultation.
- ☐ Required disclosures, privacy language, unsubscribe mechanics, and recordkeeping are included for the channel.
- ☐ Approved final asset, date, URL/screenshot, seminar materials, and distribution evidence are archived as trademark-use specimens and communications records as applicable.
- ☐ Audience criteria are relevance-based and inclusive; the marks do not create different advice standards or access.

Internal note:

These drafts are marketing starting points, not legal or compliance approvals. Adapt disclosures and review requirements to the sponsoring InVestra entity, audience, medium, services, and products involved.