



FAMILY WEALTH ADVISORS^{LLC}

INVESTMENTS, INSURANCE, ESTATE & RETIREMENT PLANNING

2017 Events Calendar

Events are by invitation and subject to change. Please call FWA to inquire or confirm an event.

**JAN
26**

Long-term Care Workshop

4pm, FWA office, 480-969-5667

- For you and a friend

Jeff will explain the mysteries of Long-term care. There are many different types available and it is something that he can decode for you to understand fully. Clients can use Long-term care benefits for themselves or as a death benefit or accumulated value as part of your financial legacy.

**FEB
9**

4th Annual Valentine's Day Spa Happy Hour Event

4pm, Gainey Village Spa,
7477 E. Doubletree Ranch Rd.,
Scottsdale, AZ 85258, 480-609-6980

- For you and your best girlfriend

A client favorite! An abbreviated late afternoon of pampering. Enjoy three mini spa services such as massages, facials, manicures, make up application, waxing services, spray tan, paraffin hand treatment or reflexology are all available at the Gainey Village Spa. In between treatments, enjoy some lovely conversation and even lovelier treats, appetizers, wine & chocolate.

Sponsored by Alec Young of SunAmerica Funds.

**MAR
22**

Racer Quilt

1pm, Modern Quilting, 4649 E. Cactus Road
Phoenix, AZ 85032, 602-710-1771

- For you and a quilting friend or family member

Judy will be teaching all skill levels how to make a fun and easy racer quilt. We will buy a jelly roll if you don't have your own, bring your sewing machine & sewing supplies (2 available if you don't have a machine).

Sponsored by Matt Melhado, PIMCO Investment Funds.

**MAR
30**

Trusts Vs. Wills Seminar

4 pm, FWA office, 480-969-5667

- For you and friend or family member

Thomas Leavell, Esq. of Leavell & Rivera will be discussing the differences between trusts vs. wills. Topics will include: how to legally avoid probate, reduce estate taxes, maintaining privacy as well as how to protect your child's inheritance from divorcing spouses and creditors.

**APR
19**

Miracle League

5:15pm, Miracle League of Arizona,
11130 E. Cholla Street, Scottsdale, AZ 85258
480-686-8137

- For you and a community-minded friend or family member

Come out and support Miracle League of Arizona which offers a safe and successful baseball experience for children, teens and adults with disabilities or special health needs. You can cheer them on at the bases, help run the game, keep the batting order running, assist bat safety or cheer for our athletes.

Sponsored by Tige Hofer of Delaware Investments.

**MAY
11**

Annual Cooking Event

6pm, 4823 E. Mulberry Drive, Phoenix, AZ
85018, 480-330-6525

- For you and a friend who enjoys cooking

Maggie Norris, owner and chef of Whisked Away has a wonderful pedigree in the food industry. She started in NYC at the Food Network and has worked with Emeril, Rocco Dispirito & Mario Batali, to name a few. We will be preparing a delicious healthy menu which is being created just for us! Menu will be available this spring.

Sponsored by Nick Hammer of Hartford Funds.

**JUN
5**

5th Annual City Hall Steakhouse Trivia Night

5:30pm, City Hall Steakhouse
6991 E. Camelback Road,
Scottsdale, AZ 85251, 480-596-5250

- For you and a witty friend or family member

A client favorite! We will start with a delectable meal at City Hall Steakhouse coupled with our Trivia Night. We will try the battle of the sexes this time around. So brush up on your radio, TV, music, history, sports, pop culture from the mid 20th century.

Sponsored by Kenny Coakley of Pacific Life Funds and Steve Sullivan of Franklin Templeton Funds.

**JUL
18**

4th Annual Ice Cream Social at the Sugar Bowl

2pm, 4005 N. Scottsdale Road, AZ 85251
480-946-0051

- For you and a friend or family member

Who doesn't love ice cream, especially during our Arizona summers? Come hang and have an ice cream on us! Sugar free options for our sugar sensitive folks.

Sponsored by Chris Jackson of American Century Funds.

Medicare Made Easy Workshops

6900 E. Camelback Road, Suite A39 at 4pm

Jan 9 & 31	Feb 8 & 21	Mar 1 & 21
Apr 6 & 18	May 1 & 18	Jun 6 & 21

www.birofinancial.com

www.familywealthadvisors.com

6900 E. Camelback Road, Suite A39 • Scottsdale, Arizona 85251 • Phone: (480) 969-5667 • Fax: (480) 969-0079

Securities, advisory services and insurance products are offered through Investment Centers of America, Inc. (ICA) member FINRA/SIPC and a Registered Investment Advisor and affiliated insurance agencies. ICA and Family Wealth Advisors, LLC are separate companies.



FAMILY WEALTH ADVISORS^{LLC}

INVESTMENTS, INSURANCE, ESTATE & RETIREMENT PLANNING

2017 Events Calendar

Events are by invitation and subject to change. Please call FWA to inquire or confirm an event.

AUG 15

Trusts Vs. Wills Seminar

4 pm, FWA office, 480-969-5667

- For you and a friend or family member

Thomas Leavell, Esq. of Leavell & Rivera will be discussing the differences between trusts vs. wills. Topics will include: how to legally avoid probate, reduce estate taxes, maintaining privacy as well as how to protect your child's inheritance from divorcing spouses and creditors.

AUG 23

Learn how to prepare your own Medicare Part D Drug Analysis

4pm, FWA office, 480-969-5667

- CURRENT CLIENTS ONLY

We will show you how to go on the www.medicare.gov website, plug in your prescriptions and run your Part D analysis for 2018. Annually there are 20-24 different carriers, and this will save you time and money. Jeff charges anywhere from \$300-500 for this service. Space is limited and this program will be repeated several times.

SEP 12

Long-term Care Workshop

4pm, FWA office, 480-969-5667

- For you and a friend

Jeff will explain the mysteries of Long-term care. There are many different types available and it is something that he can interpret for you to understand the options available. Clients can use Long-term care benefits for themselves or as a death benefit or accumulated value as part of your financial legacy.

SEP 15

Learn how to prepare your own Medicare Part D Drug Analysis

10am, FWA office, 480-969-5667

- CURRENT CLIENTS ONLY

We will show you how to go on the www.medicare.gov website, plug in your prescriptions and run your Part D analysis for 2018. Annually there are 20-24 different carriers, and this will save you time and money. Jeff charges anywhere from \$300-500 for this service. Space is limited and this program will be repeated only 1 more time.

SEP 27

Learn how to prepare your own Medicare Part D Drug Analysis * Last Chance *

4pm, FWA office, 480-969-5667

- CURRENT CLIENTS ONLY

We will show you how to go on the www.medicare.gov website, plug in your prescriptions and run your Part D analysis for 2018. Annually there are 20-24 different carriers, and this will save you time and money. Jeff charges anywhere from \$300-500 for this service. Space is limited.

OCT 20

4th Annual Ladies High Tea at The Phoenician

12pm, The Phoenician, 6000 E. Camelback Rd, Scottsdale, AZ 85251, 480-423-2530

- For you and a festive friend or family member

A real treat. Consistently voted best place for afternoon tea by Phoenix New Times & AZ Republic. A fantastic view with a fabulous pianist on a grand piano coupled with a sensational afternoon tea with three delectable courses!

Sponsored by Matt Malvey of AB Funds.

NOV 14

Annual Medicare & Prescription Drug Plan Client Meeting

10am, Fashion Square Mall—store TBD, 7014 E. Camelback Rd Scottsdale, AZ, 85251, 480-969-5667

- CURRENT CLIENTS ONLY

Join Jeff Biro for annual updates on Medicare for 2018.

Sponsored by Matt Melhado of PIMCO.

DEC 1

Holiday Wreath Making Class for All Faiths

10 am, Michael's, 8979 E. Talking Stick Way (Indian Bend Rd), Scottsdale, AZ 85250 480-362-1010

- For you and a creative friend or family member

We will provide all fall/holiday festive materials to jazz up your holiday with class and/or sass. Please meet Pam at the front of the store at 9:15am where we will purchase materials from the syllabus that will be sent to you prior to the event. We will go for lunch following the class & show off our bountiful wreaths!

Sponsored by Mike Chewing of Oppenheimer Funds.

DEC 14

Family Wealth Advisors' 5th Annual Holiday Lunch & Cookie Contest

1pm, FWA office, 480-969-5667

- CURRENT CLIENTS ONLY

Come join us for some cheer and provisions during the festive holiday season! Our holiday cookie contest has been a big hit! Winner receives a gift certificate to Fashion Square mall. Sample all of our delicious entries—only 1 recipe per family allowed. Judging starts at 2pm.

Sponsored & judged by Alec Young of SunAmerica Funds.

Medicare Made Easy Workshops

6900 E. Camelback Road, Suite A39 at 4pm

Jul 11 Aug 3 & 16 Sep 7 & 19

Oct 5 & 24 Nov 8 & 30 Dec 12

www.birofinancial.com

www.familywealthadvisors.com

6900 E. Camelback Road, Suite A39 • Scottsdale, Arizona 85251 • Phone: (480) 969-5667 • Fax: (480) 969-0079

Securities, advisory services and insurance products are offered through Investment Centers of America, Inc. (ICA) member FINRA/SIPC and a Registered Investment Advisor and affiliated insurance agencies. ICA and Family Wealth Advisors, LLC are separate companies.