



YOU'RE INVITED

# NAVIGATING YOUR FINANCIAL ROADMAP

Buckle up for a webinar with Price Wheeler at the wheel.

Our mission: to fill your financial tank with the knowledge and confidence to plot your course towards a secure financial future.

In this journey, we'll explore:

- Effective strategies for saving and safeguarding your money
- Understanding your income and spending habits
- Insights into when and how to borrow your money
- Techniques to stretch your money further
- Creating a monthly budget and a long-term investment plan
- An introduction to Environmental Social Governance (ESG)

## MEET THE HOST



**Sarah Berkley**  
AVP, Well-Being & Engagement, Northeast Region

NFP is proud to host ongoing Well-Being sessions to support our clients and our own employees.

## MEET THE SPEAKER



**Price Wheeler, AIF®**  
Financial Advisor, NFP

Price is a proud Navy veteran, father, and husband. Price is a member of the National Association of Insurance and Financial Advisors board of directors for the Northeast Florida chapter, sits on the MassMutual Worksite Advisory Council, and is a two-year (2021 and 2022) member of the Million Dollar Round Table (MDRT).

## WHEN

Thursday, September 14, 2023  
Noon – 1:00 p.m. ET

## HOW TO REGISTER

Visit [go.nfp.com/financialroadmap](https://go.nfp.com/financialroadmap)  
or scan this code.



*This session will be recorded and made available  
to registrants who are unable to participate live.*

PRESENTED BY  
**NFP**

Qualifying membership in the MDRT is based on minimum commission and gross business generated within a year, and is not based upon performance or returns experienced by any client, or opinions of the advisor's clients or former clients. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment Advisory services offered through Kestra Advisory Services (Kestra AS), an affiliate of Kestra IS. Neither Kestra IS or Kestra AS are affiliated with The Bailey Group or NFP. Investor Disclosures: <https://www.kestrafinancial.com/disclosures>