

SOCIAL SECURITY BASICS: WHAT YOU NEED TO KNOW



THURSDAY, MARCH 18 @9AM

Join The Joseph Group as Chief Wealth Planning Officer Todd Walter shares what you need to know about Social Security, including:

- Will Social Security be there for me?
- How much can I expect to receive?
- When should I apply for benefits?
- How can I maximize my benefits?

Todd D. Walter, CFP®, CPA
Partner and Chief Wealth Planning Officer

Todd advises firm clients regarding their portfolios and utilizes his extensive financial planning background to meet clients' planning needs.

Prior to joining The Joseph Group in 2009, he was a financial planner with Ronald Blue & Company in Indianapolis. Todd's career also includes time at Ernst & Young specializing in individual income taxation, and a short stint as an auditor with a regional accounting firm.



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