Special Offer for Members of National Association for Pupil Transportation

Your organization has signed an agreement that entitles all members to a 20% discount on financial planning services offered through Waddell & Reed, Inc. Both modular and comprehensive financial planning services are offered by Waddell & Reed, Inc., to help you identify, prioritize and work toward your financial planning goals and objectives.

The WADDELL & REED FOCUSPlan®, Waddell & Reed's comprehensive planning service, includes some or all (minimum of 3) of the following modules. You select the modules based on your personal financial interests and needs.

Waddell & Reed, Inc. Financial Planning Services

1. Waddell & Reed FOCUSPlan℠ Services: Planning foundation containing a Financial Profile and three or more other Select Modules to address specific financial issues.
2. Tax-Sensitive Planning Analysis: Enhances the FOCUSPlan℠ by including tax-sensitive calculations.
3. Detailed Cash Flow Analysis: This enhances the FOCUSPlan℠ with Tax-Sensitive Planning by including detailed analysis of future cash flows.
4. FOCUSPlan℠ Start-Up Plan: Contains Financial Profile and two or more Select Modules using simplified planning assumptions and calculations.
5. Waddell & Reed FOCUSPlan℠ Premier: This service is an in-depth planning service utilizing Waddell & Reed's home office planning staff.

SELECT MODULES include:		SUPPLEMENTAL Services
1. Asset Allocation	6. Income Tax	1. Investment Planning
2. Financial Independence	7. Goal Funding	2. Wealth Forecasting
3. Survivor Income Needs	8. Disability Income	3. Estate Planning
4. Education Funding	9. Long-Term Care	4. Business Planning
5. Estate Review		

Financial planning services are offered by Waddell & Reed, Inc. in its capacity as a registered investment adviser. You should contact your financial advisor or refer to the Waddell & Reed, Inc. Form ADV or Advisory Services Brochure for a complete discussion of these services and the fees associated with them.

You are entitled to a 20% discount on any of these services.
For more information, please call:

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