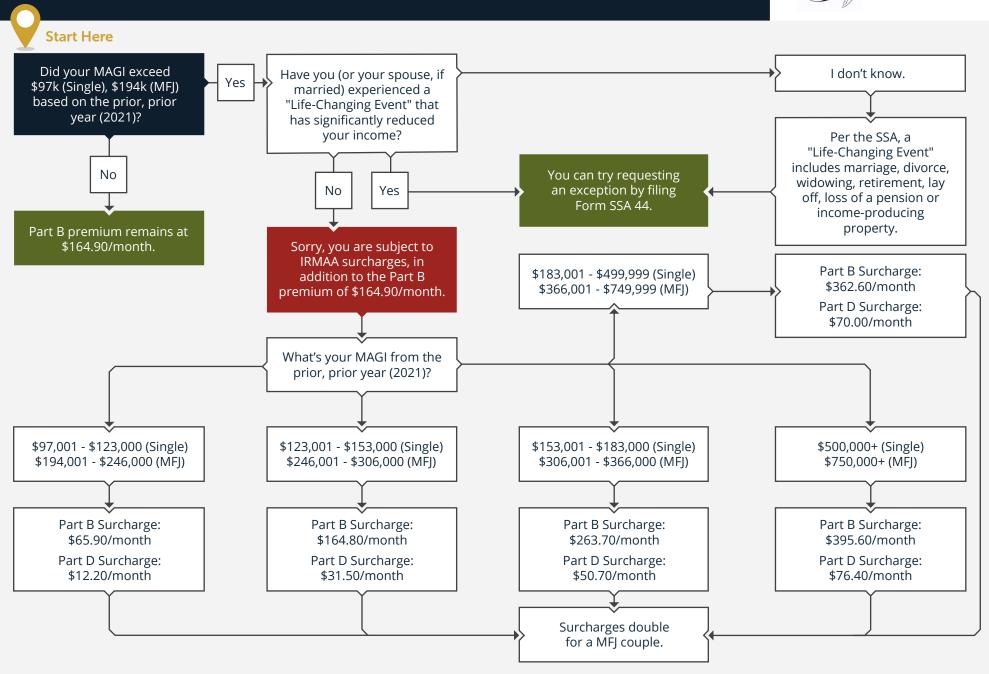
2023 · WILL I AVOID IRMAA SURCHARGES ON MEDICARE PART B & PART D?





Shakespeare Wealth Management



Investing involves risk, including the possible loss of principal and fluctuation of value. Past performance is no guarantee of future results.

This webinar is not intended to be relied upon as forecast, research or investment advice, and is not a recommendation, offer or solicitation to buy or sell any securities or to adopt any investment strategy. The opinions expressed are as of the date noted and may change as subsequent conditions vary. The information and opinions contained in this webinar are derived from proprietary and nonproprietary sources deemed by Shakespeare Wealth Management, LLC to be reliable. The letter may contain "forward-looking" information that is not purely historical in nature. Such information may include, among other things, projection and forecasts. There is no guarantee that any forecast made will materialize. Reliance upon information in this webinar is at the sole discretion of the reader. Please consult with a Shakespeare Wealth Management, LLC financial advisor to ensure that any contemplated transaction in any securities or investment strategy mentioned in this letter align with your overall investment goals, objectives and tolerance for risk. Additional information about Shakespeare Wealth Management, LLC is available in its current disclosure documents, Form ADV, Form ADV Part 2A Brochure, and Client Relationship Summary report which are accessible online via the SEC's investment Adviser Public Disclosure

(IAPD) database at www.adviserinfo.sec.gov, using SEC # 801-92171. Shakespeare Wealth Management, LLC is neither an attorney nor an accountant, and no portion of this content should be interpreted as legal, accounting or tax advice.

Shakespeare Wealth Management, Shakespeare Wealth Management

N22 W27847 Edgewater Drive Suite 101 Pewaukee, WI 53072 info@shakespearewm.com | 262-814-1600 | ShakespeareWM.com