



Do You Need An Advanced Estate Plan?



Please join us for an informative event.

An advanced estate plan can help ensure not only that your family's future financial needs will be taken care of, but also that your wealth will be passed on in the most tax-efficient manner possible. It's also an opportunity to create a legacy for grandchildren and to make charitable gifts in a way that best suits your financial situation.

In this seminar on Advanced Estate Planning, you'll learn:

- Who can benefit from advanced estate planning strategies
- The changing landscape of the federal estate tax system, including information on exclusions and the marital and charitable deductions
- Techniques to minimize estate taxes, including different trust arrangements
- Common estate freeze strategies such as family limited partnerships and private annuities

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.

When & Where

Event Location:
123 Main Street or Zoom link
Wednesday, March 3, 2021
10:40 AM to 12:40 PM

R.S.V.P.

To reserve your spot, please contact me at:
Registered Rep Phone
[Registered Rep email address](#)



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