

Thursday Insights for April 2008
2:30 p.m. – 4:00 p.m.

Thursday, April 3, 2008:

Collaborative Planning for Business Owners

with Alejandro Matuk, Esq. and Gregory Banner, CFP® ,CLU

Greg and Alex will address issues that business owners should consider when evaluating the future prospects of their company and how a professional collaborative approach can be utilized to provide greater value to the client. The topics to be discussed include how entity selection, formation, and review can be a valuable part of the business. We will also discuss tax reduction strategies and real life examples.

Thursday, April 10, 2008:

Leveraging Your IRA

with John L. Jenkins, AEP, CSA, EA, CFP® and Rodney J. Hatley, Esq.

Do you know what kills more large IRA accounts than anything else? - Admiration. Admiration kills large IRA accounts because the owner and even the financial advisor who helped them grow the account fail to plan for the ultimate income and potential estate taxes due on the balance. Instead, they get caught up in growing the account to the largest possible balance, admiring each statement and deriving great satisfaction from their savings and investment success. Come and learn how to leverage an IRA into a legacy asset that supports not only the owner and their spouse, but also several generations of beneficiaries.

Thursday, April 17, 2008:

It doesn't matter if you are wealthy or not, we all are faced with difficult decisions when growing up, but affluent families have more at risk and possibly more to lose. Whether it is a DUI or a prank gone bad, there are counseling options available. Come and learn about criminal law: youthful offenders, options available for bail and understanding the overall process. Collaborate to provide complete family planning when confronted by emotional, financial, and legal situations.

Thursday, April 24, 2008:

with Van Whiting, Jr., Financial Advisor, Ameriprise.....

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