

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

Thursday, July 3, 2008:

Employee Benefits for All

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

Fringe benefits are usually offered by an employer to attract and keep good employees. Greg and Alex will review several of the plan types and which plan might be appropriate for different business situations from the perspective of business goals, cost, and complexity.

Thursday, July 10, 2008:

Tax Bracket Maximization

with John L. Jenkins, AEP, CSA, EA, CFP®, and Stephen J. Mancini, Esq.

This workshop will continue a series on strategies for the large IRA. Last month we discussed leveraging the large IRA through life insurance. This month we will explore the amazing power of the Stretch IRA, how to set it up, timeline requirements, IRA custodian issues and pitfalls as well as guaranteeing the payout over the life expectancy of the named beneficiary.

Thursday, July 17, 2008:

Acquiring Direct Ownership of an Investment Property

with Ronald R. Ceniceroy, Financial Planner

Tempted to buy a rental property as an investment? Make sure you know the steps on how to do it right and whether you have the characteristics to handle the job of a landlord. Acquiring a rental property sounds like easy money—you'll acquire equity in the property and someone else pays the mortgage. However, dealing with maintenance problems, business issues and tenants isn't a job for everyone. Before you buy and hang the "For Rent" sign, come find out the steps needed to acquire direct ownership of an investment property. We will also be discussing whether you have the skills required patience to become a successful landlord.

Thursday, July 24, 2008:

Pre-Empted Due to the SCI Laureate Instructor Training

Thursday, July 31, 2008:

Pre-Empted Due to the SCI Team Building Event

RSVP to:
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