

SECRETS OF THE WEALTHY SEMINAR

A Discussion of Wealth & Estate Planning Tools Normally Reserved for the Affluent



Ever wondered how the affluent keep so much of their own money? How do they save on taxes? What tools do they use?

Learn the secrets used by America's rich to grow, protect, utilize, and transfer your wealth:

- Create the most tax-efficient retirement nest egg
- Avoid the 3 biggest mistakes financial planners make
- Protect your wealth from the market, lawsuits, & other risks
- Avoid court involvement & high estate administration costs
- Maximize wealth transfer to heirs or favorite charities
- Reduce - and possibly eliminate - federal estate taxes

This event is appropriate for couples and individuals who require a wealth and estate plan that minimizes taxes while maximizing the value of their estate, charitable gifts, and transfers to heirs.

DATE / TIME:

October 14 (Tues.)

6:30 p.m. to 8:30 p.m.

LOCATION:

Gulliver's Restaurant
18482 MacArthur Blvd.
Irvine, CA 92612



REGISTRATION:

Admission and dinner are complimentary however seating is limited to 20 seats per night. Please reserve your seating by calling Helen at (714) 573-7149 or online at www.ocestateplanning.net

Hosted By: Tamsen Reinheimer

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Guest Speaker: Darren Whissen



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