You are personally invited

to our Advisors Series Workshop:

Hot Topics in Estate and Business Planning

In this workshop, popular topics and strategies will be discussed in regards to Estate and Business Planning. It is important to stay relevant with new tax laws being implemented as well as knowing the strategies needed to help clients overcome these challenges.

- Learn about the new and additional taxes under the Affordable Care Act
- What low interest rate planning opportunities are being used now?
- Learn what strategies clients should consider in an increasing tax environment

Presented by:

Kathryn Wakefield, JD, CLU

Kathryn is the Director of Estate and Business planning for MassMutual Financial Group. She earned her law degree from Western New England College School of Law and has since been a resource to both producers and clients in Estate and Business Planning.

<u>Date, Time, and Location</u>

Thursday, September 18, 2014 12:00 pm – 1:30 pm
6800 Jericho Turnpike Suite 202 West
Syosset, NY 11791
Lunch will be served!

This will fill up quickly! To register, RSVP to Janae Bloom

janaebloom@financialguide.com or 516-677-3748