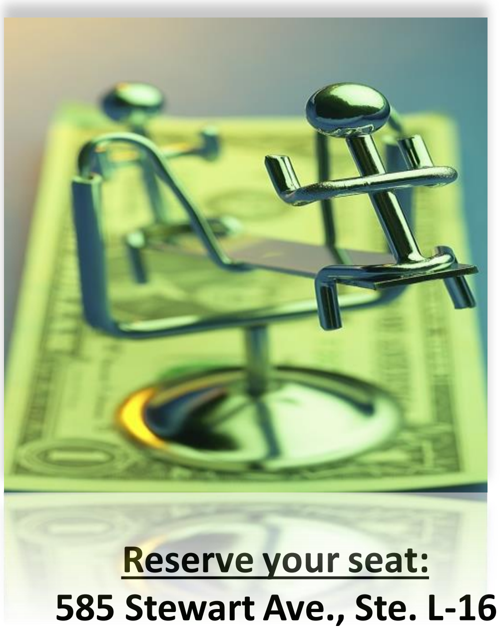
Who Needs Advanced Estate Planning?

An Overview of Estate Planning Strategies

Advanced Estate Planning

A Balancing Act



This is one of several workshops to provide the attendee with an understanding and application of the essential planning topics necessary to manage your financial life. This information will provide you with a comprehensive financial foundation, along with advanced planning strategies to help you plan for a successful financial future.

The following Advanced Estate Planning subjects will be covered:

- ✓ The Federal Estate Tax System
- ✓ Minimizing Estate Taxes
- ✓ Minimizing Estate Taxes-*Optimizing Marital Deduction*
- ✓ Legacy Planning – *Passing Assets to your heirs*
- ✓ What Is an Estate Freeze?
- ✓ Charitable Giving
- ✓ Asset Protection– *Using Trusts*

Instructor: Michael J. Aluotto, CRPC®

Mr. Aluotto is President and Private Wealth Manager of Vertex Wealth Management and has managed clients' wealth for more than 35 years. He is a Chartered Retirement Planning Counselor® and an Investment Advisor Representative , and earned his Bachelor of Science degree from Cornell University.

Reserve your seat:

585 Stewart Ave., Ste. L-16

Garden City, NY 11530

Call: 516-294-8200

mjaluotto@1stallied.com

VERTEX WEALTH MANAGEMENT, LLC