What Is an Estate Plan?

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 ensure a successful financial future.

<u>The following Estate Planning subjects will be covered</u>:

- ✓ Who Needs an Estate Plan?
- ✓ Basic Estate Planning Concepts
- ✓ Planning for Incapacity
- ✓ What Happens If You Die Without an Estate Plan?
- ✓ Wills & Probate
- ✓ Tax Basics
- ✓ Lifetime Gifting
- ✓ Trusts
- ✓ Life Insurance

<u>Instructor: Michael J. Aluotto, CRPC®</u>
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.

Estate Planning Basics

<u>An Overview of the Estate Planning Process</u>

<u>Reserve your seat:</u>
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