

How SMART Are Your Goals?

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.

The following Financial Planning subjects will be covered:

- ✓ Setting Your Goals
- ✓ Budgeting
- ✓ An Emergency Fund
- ✓ Using Credit
- ✓ Growth, Income, and Stability
- ✓ Debt
- ✓ Estate
- ✓ The Value of Tax Deferral
- ✓ Planning Fundamentals
- ✓ Retirement

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.

Financial Planning Basics



Reserve your seat:

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