

What's In Your Financial Suitcase?

Did you forget to pack some essentials to help prepare for a successful financial future? This valuable workshop will provide you with a comprehensive overview of financial planning strategies, so you don't leave anything behind on your journey to financial independence.

- *How to best accumulate and preserve your wealth to*
- *Help meet your financial goals*
- *Types of investments*
- *Create a cash flow and net worth statement*
- *The value of tax deferral*
- *Professional liability protection*
- *Estate plans and who needs one*

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.



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