

Who Needs Advanced Estate Planning?

An Overview of Estate Planning Strategies

Date: October 23, 2013/ Time: 6:30 pm

Location: Mid-Island Y JCC

- **45 Manetto Hill Road**
- **Plainview, NY 11803**

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

About the Instructor: Mr. Aluotto is the President of Vertex Wealth Management, LLC and is an independent Private Wealth Manager with the broker dealer First Allied Securities, Inc.



Reserve your seat:

Call: 516-294-8200

or email:

mjaluotto@1stallied.com