

What Is an Estate Plan?

Date: October 16, 2013 / Time: 6:30 pm

Location: Mid-Island Y JCC

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

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 Estate Planning subjects will be covered:

- ✓ 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

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.



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Estate Planning Basics

An Overview of the Estate Planning Process



Reserve your seat:

Call: 516-294-8200

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