

# How SMART Are Your Goals?

**Date: December 11, 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 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**

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.



## Financial Planning Basics



**Reserve your seat:**

**Call: 516-294-8200**

**or email:**

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