

# Upcoming Mid-Island Y JCC Workshops:

**Location: Mid-Island Y JCC • 45 Manetto Hill Road • Plainview, NY 11803**

This series of workshops aim to provide the attendee with an understanding and application of the nine essential personal financial 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. Reference materials will be provided.



## The following Financial Planning subjects will be covered:

- ❖ Wednesday 10/02/2013: Social Security
- ❖ Wednesday 10/09/2013: Long Term Care
- ❖ Wednesday 10/16/2013: Basic Estate Planning
- ❖ Wednesday 10/23/2013: Advanced Estate Planning
- ❖ Wednesday 10/30/2013: Retirement Planning
- ❖ Wednesday 11/06/2013: Retirement Income
- ❖ Wednesday 11/20/2013: Investments
- ❖ Wednesday 12/04/2013: Roth IRA Conversions
- ❖ Wednesday 12/11/2013: Financial Planning
- ❖ Wednesday 12/18/2013: Woman and Investments
- ❖ Wednesday 01/08/2014: College Planning
- ❖ Wednesday 01/15/2014: Special Needs Planning

### 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:**

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