

# What's In Your Financial Suitcase?

Did you forget to pack some essentials to ensure 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 success.

- *How to best accumulate and preserve your wealth to 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 25 years. He is a Chartered Retirement Planning Counselor® and an Investment Advisor Representative, and earned his Bachelor of Science degree from Cornell University.



**Thursday, April 3 - Sunday, April 6, 2014**  
**Be Sure to Attend the Presentations as Listed**  
**The Revel - 500 Boardwalk, Atlantic City, NJ 08401**

**Workshop is Exclusive to Members of:**



**Reserve Your Seat Today!**  
**Contact Stephanie at**  
**(908) 387-1750 or [stephanie.wilson@aocpmr.org](mailto:stephanie.wilson@aocpmr.org)**

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