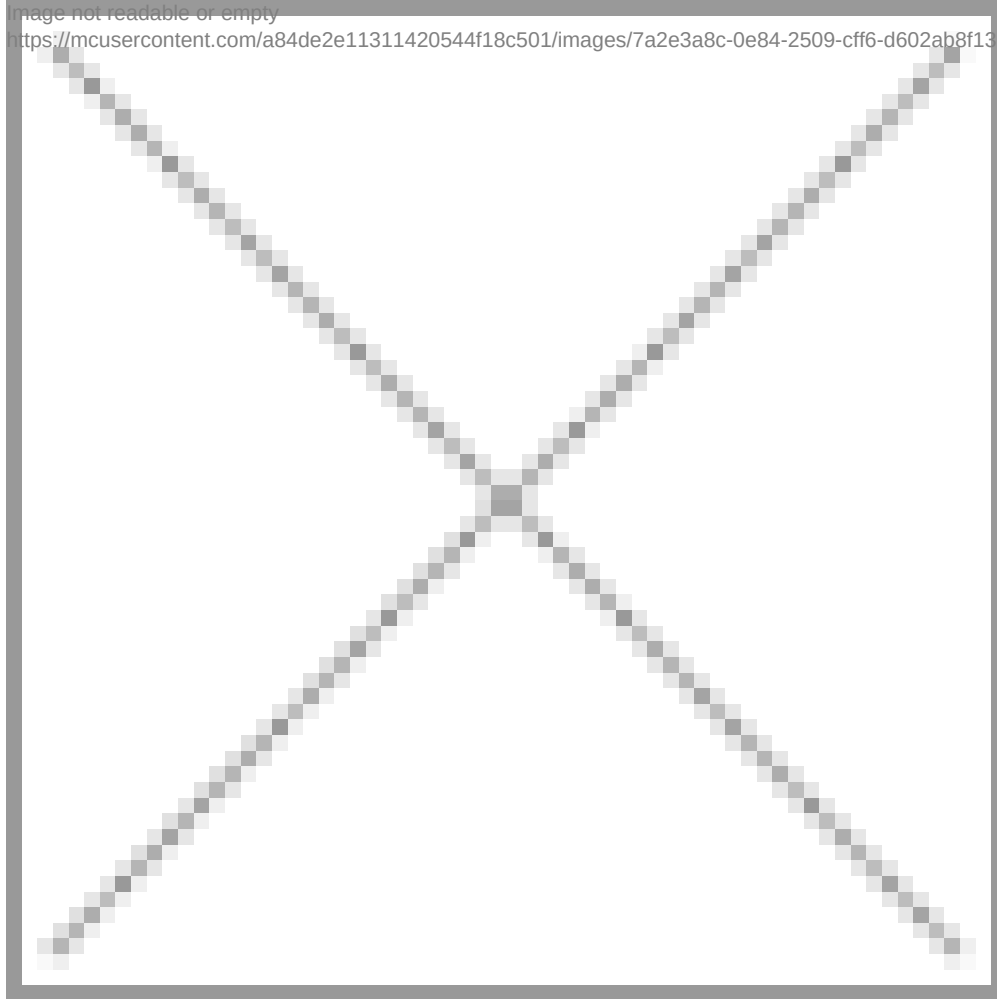
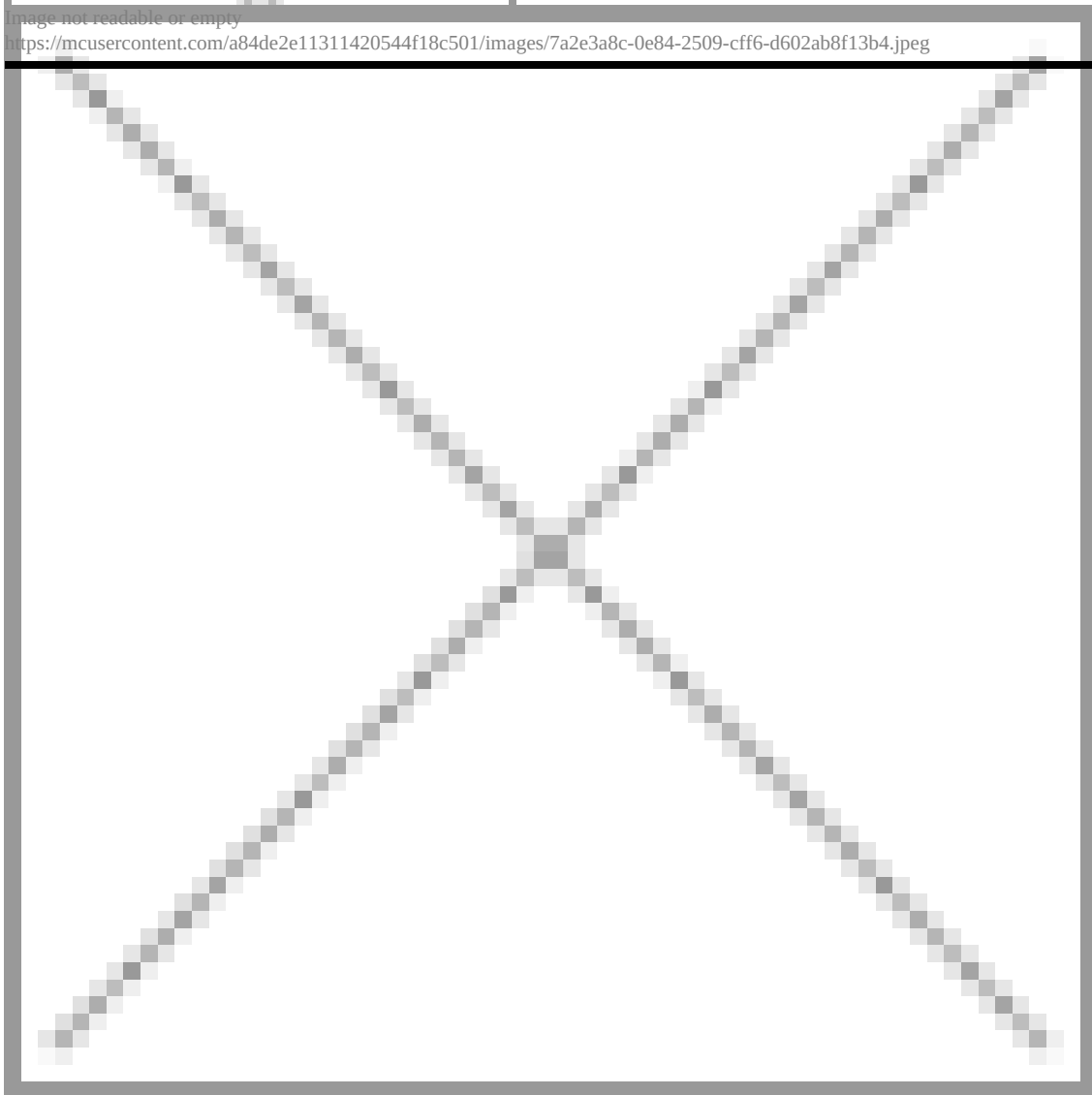
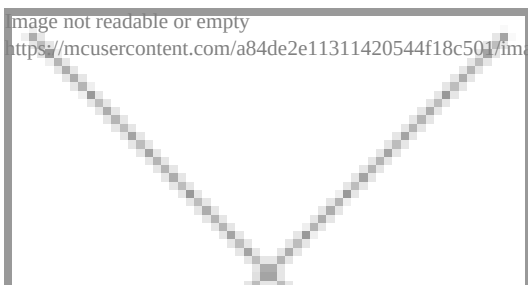


Reminder: Update 2022 - Purposeful Planning

Submitted by Rica Zara on May 3, 2022 - 11:44am

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Wednesday, May 11 from 9:00 A.M. to 12:00 P.M. (PDT) and Wednesday, May
18 from 9:00 A.M. to 12:00 P.M.
Register Now

Available spots are limited and will be on a first-come, first-served basis.
Your confident expertise, your support and reassurance, knowing that together you
and your clients will find the best way forward for the short term and the long term

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Update 2022 Explores:

- **An Economic and Market Overview**, understanding the economic indicators that could influence the performance of financial markets and the impact that may have on clients
- **Legacy Planning**, considering how clients nearing retirement can balance their legacy planning objectives with immediate family support and their lifetime cash flow needs
- **Building Client Trust and Deepening Relationships through Higher Standards**
- **Taxation and Succession Planning for Business Owners**

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