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Addressing Your Overall Financial Picture:

- Estate planning can be an essential part of this process for many reasons.
- In these uncertain times, you can take comfort in being proactive.
- Investments, taxes, financial planning, estate planning, legacy, and risk management, etc.

For additional information, please contact:

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PRESENTERS

Diane J. Stein VP, Sr Relationship Strategist

Rebecca L. Sarelson, J.D., LL.M. VP, Sr Wealth Strategist

Dates:

Thursday, October 13, 2022 Time: 12:00 pm to 1:00 pm Wednesday, November 9, 2022 Time: 4:00 pm to 5:00 pm

Location:

Florida Atlantic University (FAU) Instructional Services Bldg (IS-04), Conference Room 114 777 Glades Road Boca Raton, Florida 33431





