

Please join us

Creating a family love letter through estate planning strategies



Please join us for Advice. Beyond investing. We will discuss personal strategies for wealth management including quantitative tips from tax-efficient gifting tactics to qualitative topics like wishes, wants and intent with regard to estate planning.

Join local Certified Financial PlannersTM, Margo Jones and Jessica Anderson and former head of planning for New England at UBS, Tom Cosinuke, as we discuss effective ways to plan for the unexpected for you and those that are most important to you.

Thursday, March 16

5:00 - 7:00 p.m.

Andrea Mead Lawrence Lodge Pico Mountain Resort

73 Alpine Drive Killington, VT 05751

Light refreshments will be served.

RSVP by Monday, March 13 Alicia Munukka

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Hosted by Integrity Wealth Management Group

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