

# 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 PLANNERS™, 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**

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