

Tax favored investing.

This powerful workshop content keeps in mind the saying, "It's not what you make but what you keep that's important." With this thought in mind...

- We review what drives tax rates and the future implications of possible tax increases to the financial plan.
- How is your money being taxed today, and how may it be taxed in the future?
- Diversification, which may include asset allocation, risk tolerance, liquidity needs, and tax liability will be discussed.
- Several models for structuring financial portfolios will be introduced, as well as effective ideas for tax reduction.

Join us for this free workshop

December 12th, 2014

7:30 – 9:00 PM

Chelmsford High School

200 Richardson Rd, North Chelmsford, MA 01863

If you would like to sign up for this seminar, call me Jing Wang CLU® at 617-331-7820 or email jwang@ft.newyorklife.com

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