



POST-ELECTION YEAR-END PLANNING STRATEGIES

Join us as Partner and Chief Wealth Planning Officer Todd Walter, CFP®, CPA looks at several year-end planning strategies including Deduction Planning, Capital Gains Tax Avoidance, and Roth Conversions, and how those and other items might be impacted by the Biden tax proposals.

**THURSDAY,
DECEMBER 3 - 9 AM**



**RSVP to
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