

YMCA Foundation Wealth Management Seminar Series

*7:30 – 8:45 a.m., Breakfast Meetings, at the Green Hills Hampton Inn
(Unless indicated below)*

Mar. 26, 2008 The Involuntary Philanthropist: How will the Government Spend 55% of your Estate?

Basic estate planning with emphasis on the significant savings that can be achieved with simple planning, as well as focus on impact of estate tax.

Presenters: James Gooch (*moderator*), Christy Cole, Linas Sudzius, Stephanie Edwards

May 21, 2008 Alternatives in Retirement Planning/Spending: Are you doing all that you should?

Retirement planning with options and annual limits. Emphasis on distributions from retirement plans, and taxation of balance at death. Strategies to withdraw assets efficiently with charitable alternatives.

Presenters: Carla Lovell, Steve Renner, Blaine Smith, Ron Knox, Roy Jordan

Sept. 18, 2008 Financial Fitness for Women Luncheon, Hillwood Country Club

Presenters: Stephanie Edwards, Carla Lovell, Gail Bradford, Christy Cole

Oct. 21, 2008 Forty Acres and a Mule: Would you Rather have the Mule? Focus on common problems in transferring real estate and the liability associated with it. Introduces charitable options.

Presenter: Mike Sontag

Jan. 21, 2009 Ten Top Estate Planning Traps for the Unwary

Presenter: Mike Sontag

Apr. 21, 2009 Cover Your Assets: Avoiding Personal and Business Liability

Presenters: Bryan Howard, Jay Cloud

May 21, 2009 Financial Fitness for Women Luncheon (location TBA)

Presenters: Stephanie Edwards, Carla Lovell, Gail Bradford, Christy Cole

Sept. 22, 2009 Planning Options for Growing Wealth for Successful Investors and Business Owners

Basic income tax/capital gains planning.

Presenters: Mike Sontag, Christy Cole & Roy Jordan

Oct. 28, 2009 The Family Limited Partnership and Business Succession

Presenters: Bryan Howard, Linas Sudzius & Steve Renner