

Financial Forum Just for Boomers

New Strategies for Getting Your Wealth Plan on Track!

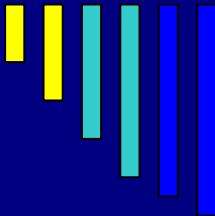
Sponsored by **BOOMERS & BEYOND**

Please join us **Thursday, March 18th** from 7 to 9 pm

Doors open at 6:45 for sign in and hospitality

WALLACE HALL at the Church of St. Ignatius Loyola – 980 Park Ave. (at 84th St).

Our Panel of Financial Experts will discuss retirement planning issues including:



- **Saving** ~ how to build a retirement nest egg to last a lifetime.
- **Consolidating** ~ IRA's, Roth IRA conversions.
- **Managing** ~ protecting retirement income to provide an income stream.
- **Estate Planning** ~ strategies for your peace of mind.

Moderator and Panelist: **LAWRENCE KLEPNER, Esq.**, *Managing Partner, Manhattan Ridge Advisors*

Panelist: **LISA WHITCOMB, Esq.**, *Sr. VP, & Managing Director., Glenmede Trust.*

Panelist: **TOM JOHNSON, Sr. VP, Retirement Income Security, New York Life.**

Plus ~ Guest Speaker

LARRY KUDLOW

A Personal Journey from Washington to Wall Street



Host of CNBC's *The Kudlow Report* and WABC radio's *The Larry Kudlow Show*, nationally syndicated columnist, and CEO of Kudlow & Co., LLC

***TICKETS:** \$15 single / \$25 couple (\$20 & \$30 at the door) ~ to purchase tickets online email us at:

boomersandbeyondnyc.com or send check to: *Boomers & Beyond* c/o Church of St. Ignatius Loyola

980 Park Ave., NY 10028. For more information: **646-241-1332.**

RSVP by MARCH 15th

This presentation should not be used as a basis for legal and/or tax advice. Persons in attendance should seek the guidance and advice of their own legal and tax counsel. Estate planning is done in conjunction with your estate planning attorney, tax attorney and/or CPA.