Mei Mei is proud to organize this special financial education event for her friends and clients as a token of thanks for all your always trust and support to her.

Tax Diversification and Estate Planning 101

As the nation's financial challenges continues to make headlines, it may be critical to join this eye-opening seminar designed specifically for brilliant professionals like you, and learn about a new and revolutionary retirement, tax and estate planning process that can significantly improve not only the comfort level of your retirement, but also your family's ultimate financial success and peace.

What You Will Happily Learn:

- Understand the "good, bad, ugly and flaw" of the traditional retirement planning upfront and learn about your alternative options to tax diversifying your retirement income because you probably don't want to ask yourself these tough questions like many others at their 60s nowadays do: "In terms of performance, my 401(k) just became 201(k) or even 101(k), and I am retiring in 6 months, now what?", "Hmmm, Social Security is becoming Social 'Insecurity' - what if I live too long? Would I need to 'retire twice' to ensure I don't outlive my retirement savings?", "Wow, I never know I would have to pay THIS much income taxes – now I feel that this is NOT my retirement, it's actually Uncle Sam's retirement!!! Why wouldn't anyone tell me 'the end of the story' at the very beginning?"
- Discover how taxes can significantly impact Your Net Result, which will allow you to identify "hidden holes" in your current plan and discover what tax planning techniques you may consider to cover the "holes" and minimize the "hidden leaks". Would it also be important enough to you to look beyond traditional "Buy and Hold" strategy of wealth accumulation when roller coaster ride may become the "new normal"?
- "Will and Trust 101" and what these crucial legal documents can help you maintain control and protect whom you desire to protect financially, physically and emotionally(including yourself!)– What exactly are will and living trust, and how to set them up to better protect your family? An Attorney and CPA specialized in advanced business, estate and tax planning will share with you how a strategic estate plan can lead to your family's ultimate financial success, peace and legacy or why a "No-Plan Plan" can lead to a false sense of security, missed fortune and your family's worst nightmare, especially when you have minor children and certain financial assets - though you may not consider yourself affluent YET.

Date and Time

Sunday Nov 7, 2010
2:00 pm – 4:00 pm

(Please Note it is the first day that Summer Daylight Time ends)

Location

Hilton Newark / Fremont
39900 Balentine Drive, Newark, CA 94560

Speakers

Alan Chew, JD, CPA, ChFC, CLU
Vivian Feng, Financial Service Professional
Janet Wong, CPA

RSVP

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