



Current Seminar Topics

“21 Ways to save Money on income taxes”

A comprehensive look at 21 tax-saving strategies including IRAs, 401k plans, SEPs, Roths, Charitable Trusts, municipal bonds, tax shelters, 529 plans, and many more.

Estate Planning: Life after Death

Many of us may already be “playing the back nine.” We’re certainly not done yet, but we may be at a stage in our lives where thinking about what we leave behind and how it impacts those we love is very important. The estate plans you make today won’t matter much to you, unfortunately, but they will make a tremendous difference to the people and to the organizations you care about. Learn a few simple strategies that can make your hard work live forever!

The Seven Secrets of Professional Investors

Learn the methods used by top institutional investors to grow and protect their portfolios in nearly all kinds of markets. These techniques were once reserved for only the wealthiest households and corporations but can now be used by any investor with the knowledge.

“Global Investing – The Wave of the Future”

A broad overview of the growth and income potential in the foreign markets. Learn why foreign markets are expected to outperform the U.S. going forward. The mechanics of investing abroad including a discussion of the risks and rewards of various investment ideas.

Education: The Greatest Gift

The greatest gift you can give your children or grandchildren is to assist with the soaring costs of a college education. Learn about the new ways to help including 529 Plans, Education Savings Accounts, IRAs, and Trusts.

Doing Well by Doing Good

Can you translate your personal and family values into a viable investment strategy? The answer is yes! Learn how as we discuss “socially Conscious” investment strategies.

Women & Investing

Today many women face special challenges when it comes to investing. This discussion goes beyond the basics and addresses the critical strategies women need to implement for success.