

CLICK HERE TO REGISTER NOW!

***The Prudential Insurance Company of America Presents:
IT'S YOUR ESTATE...Are You In Control?***

Many people don't do estate planning, because they think it applies only to people who are rich or famous. In fact, estate planning is for everyone! It is important if you want to help minimize taxes on what you leave behind and do all you can to provide financial security for your family. You may even want to give some of your estate to one or more charities.

The bottom line is that estate planning is not just about taxes and having a will!

Rather, it's about helping to make sure that what you have goes to whom you want, when you want, and exactly the way you want, all at the least cost and hassle possible to you and the people you love. I conduct these events to show my friends and neighbors in the area that there are options when it comes to Estate Planning.

Key topics we'll discuss at this event:

- Do You Need Estate Planning?
- How Assets Are Transferred at Death?
- Why You Need a Will
- Why You Need a Durable Power of Attorney
- A Healthcare Power of Attorney
- Do You Need A Trust?
- Beneficiary Planning: You Do Have Options
 - Individuals, Trusts and Charities
- Qualified Retirement Plans: IRA, SIMPLE IRA, SEP-IRA, 401(k), 403 (b), 457, and Keoghs
- What about ROTH IRA's?

My name is Barbara Burke CFP®, CLU, ChFC, a Financial Planner with The Prudential Insurance Company of America and I help my friends and neighbors in Marin County understand their options when it comes to their financial and retirement planning strategies. Presenting at this seminar is Michelle Lerman. She is an Attorney at Law and Certified Legal Specialist Estate Planning, Trust & Probate Law by the California Board of Legal Specialization of the State Bar of California with the firm Lerman Law Partners, LLP, which is separate from and unaffiliated with Prudential and its affiliates. There is no cost or obligation to attend this special event.

Dessert & Coffee

Tuesday
February 1, 2011
7:00 PM

LOCATION



EMBASSY SUITES
HOTELS®

101 McInnis Parkway • San Rafael, CA

or

Continental Breakfast

Thursday
February 10, 2011
10:00 AM

LOCATION

ACQUA HOTEL

MILL VALLEY

555 Redwood Highway • Mill Valley, CA

CLICK HERE TO REGISTER NOW!

Seating is limited. To make your reservations, call 888-870-3321 and give the RSVP Code!

(888) 870-3321

Your RSVP Code #
Lerman