

Advanced Planning for Startup Founders

A deep dive into planning for startup founders, focusing on tax minimization and trust solutions

Hosted by: Presidio Partners

Warren Coughlin, CFP® Senior Vice President

Speakers: Rebecca Sterling, Senior Wealth Strategist - Advanced Planning Group -UBS

Wednesday, April 12th from 10am-10:45am PT

RSVP to receive calendar invite

RSVP by Wednesday April 12th Sam Bloom 310-734-0821 samantha.bloom@ubs.com



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