Year End Planning for Entrepreneurs

Things to think about before year end, planning opportunities and changes to be aware of next year.

Hosted by: Presidio Partners
Warren Coughlin, CFP®, FA-PWM, Senior Vice President – Wealth Management

Speaker: Casey Verst, Senior Wealth Strategist, Advanced Planning – UBS Financial Services Inc.

Wednesday, October 22 from 11 - 11:45 am PT

RSVP to receive Teams meeting details

RSVP by Tuesday Oct 21
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