



CROWN WEALTH
STRATEGIES

Advanced Planning Group – Virtual Seminar for Clients



As we navigate through life's journey, it's essential to ensure that we safeguard our future and the legacy we leave behind.

With this in mind, I'm excited to extend a special invitation to you for our upcoming Estate Planning 101 seminar.

Sincerely,

Lizzie Dipp Metzger



Complimentary Workshop

Estate Planning 101

You are invited to attend Estate Planning 101, a complimentary informational workshop designed specifically to discuss the basic fundamentals of estate planning. Topics covered include:

- Common estate planning terms and definitions
- Essential estate planning documents
- Tips to avoiding probate
- Estate and gift taxation

Seminar workshop and sales presentation

Date:

Presented by:

March 12th

Time:

12 PM - 1 PM Central Time

Registration Required, Limited Capacity!

Brad Penny, LUTCF

Corporate Vice President

Advanced Planning Group,

New York Life Insurance Company

REGISTER

NEED TO SCHEDULE?



We are now able to meet in person, via phone or Zoom! We are here to work with you whatever your preference!

Try our new easy scheduling system, just choose the type of meeting and date/time that works for you and schedule anytime!

Schedule a Review



ESTATE PLANNING



BUSINESS PLANNING



PERSONAL PLANNING

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Your Team

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