



CROWN WEALTH
STRATEGIES

Advanced Planning Group – Virtual Seminar for Clients



I am excited to announce that the Advanced Planning Group will be hosting a seminar titled "Sunset on the Horizon: Preparing for Scheduled Income & Estate Tax Changes in 2026."

The seminar will delve into crucial insights and strategies to navigate the anticipated tax changes in 2026. We believe that this event will provide valuable knowledge and guidance for effective financial planning.

Looking forward to your participation.

Sincerely,

Lizzie Dipp Metzger



Complimentary Workshop

Sunset on the Horizon: Preparing for Scheduled Income & Estate Tax Changes in 2026.

You are invited to attend **Sunset on the Horizon: Preparing for Scheduled Income & Tax Changes in 2026**, a complimentary informational workshop designed specifically to discuss the upcoming legislative sunset of Tax Cuts and Jobs Act and its anticipated impact beginning January 1, 2026.

Topics covered include:

- An overview of the sunset provisions leading to increases in income and The top ten income tax planning strategies to implement now in anticipation of the sunset.

- The top ten estate planning strategies to implement now in anticipation of the sunset.

Seminar workshop and Sales Presentation

Date:

March 28th, 2024

Time:

4 PM Eastern Time

**REGISTRATION REQUIRED –
space limited**

Presented by:

Christy Rodriguez Cottrell, J.D.

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

Give Us A Call

915-613-4300

Email Us

Create a Plan



Get The App

Visit the client
portal!



Your Team

Lizzie Dipp Metzger
President, Financial Advisor
emetzger@crownws.com

Brian Metzger
President of Business Development
bmetzger@crownws.com

Christine Walter
Director of Operations
cwalter@crownws.com



Crown Wealth Strategies | PO Box 13325 | El Paso, TX 79913 US

[Unsubscribe](#) | [Update Profile](#) | [Our Privacy Policy](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!