

Financial Education Seminar

It's More Than Saving and Spending

January 20, 2024

10:30 AM

First Republic Bank

400 S San Antonio Rd

Los Altos, CA 94022



Join us as we discuss key money principles and strategies that will help reach our financial goals, including our retirement and our legacy. We will also talk about ways to minimize our tax risk, whether we are currently retired, or are planning for it.

Key Topics:

- Money basics - Learn how money flows, the importance of liquidity and uninterrupted compounding.
- Unnecessary Wealth Leaks - Identify what areas where you are unknowingly losing money and having it work less efficiently for you.
- The Four Most Important Questions -- Learn what the four most important financial questions we all need to know for a secure retirement.

RSVP HERE

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