# Estate Planning & Retirement

## Free Workshop Event

Thurs., **Nov. 2nd**, 2017
at
**5:30** PM

Come to this FREE workshop event where you can learn all about Estate Planning and Retirement Planning. How does one affect the other and how to make sure your estate assets and your retirement assets are protected. Learn how to **AVOID the TOP TEN MISTAKES** in Revocable Trusts. Having a trust done correctly is a crucial factor in making sure your family is protected for the future.

Key points that will be covered:

- How to tell if your trust is correct
- Retirement Planning and how to protect it
- Why do you need an Estate Plan
- Asset Protections and Legacy building
- Educational funding for your children and grandchildren

## Event Location

### The Center Club

650 Town Center Drive, Garden Level
Costa Mesa, CA 92626

## Registration Required!

This workshop is FREE to attend but you **MUST register**. Light refreshments will be served.
**Register at:**

**OR CALL**

**888-735-7686**

**Space is limited!!**

Reserve your spot today!

## *Hosted and Presented by*


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### About R. DeDe Soto

With more than 15 years of legal experience, R. DeDe Soto is prepared to provide you with the knowledgeable advice and skilled representation you need. DeDe is focused on providing personalized, tailor-made legal solutions that protect the assets and the wishes of her clients. As a trusted advisor, DeDe will help you make the very best personal, financial, legal and business decisions for your family throughout your lifetime. You will know what to do so that your family never has to be stuck dealing with a totally unnecessary and expensive court process if something does happen. Your family needs the protection of an estate plan done correctly and thoroughly. Don't leave it to chance or to a judge to decide what is best for your loved ones.

### *About Richard Underwood*

Richard has been providing financial & estate planning services to affluent families and closely held businesses since 1982. He has owned and operated several Registered Investment Advisory firms including fee based family offices, fee based financial planning firms and fee based investment advisory firms. A graduate of the University of Colorado School of Business and the University of Denver, Richard has held several professional designations including Certified Public Accountant (CPA), Certified Financial Planner (CFP), and Certified Financial Analyst (CFA).

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