

Join Us for a FREE Event!



Joe DeCiccio

# Prepare Wisely: Estate Strategy Essentials Workshop



Gretchen Burgess

Estate planning helps individuals and couples ensure that their wishes are met after passing or during times of disability or incapacity.

Join **Estate Planning Attorney Gretchen Burgess** and **Financial Advisor Joe DeCiccio** for an insightful discussion on key topics to consider as you plan your legacy.

- Powers of Attorney, Wills and Trusts: What is the Difference?
- Types of Trusts
- Funding Your Trust
- Payable-on-Death Accounts and Transfer-on-Death Assets
- Deferred Investment Strategies and Tax Planning to Benefit Heirs
- Tax Considerations
- Having Hard Discussions with Family
- Q&A

## When:

**Thursday, October 24**  
**5:30 p.m. – Light Appetizers**  
**6-7 p.m. – Presentation**

## Where:

**The Bottle Shop**  
**617 West Main Street**  
**Lake Geneva, Wisconsin**

Please scan the image to RSVP by Thursday, October 17.



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