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-2021-

Save the Dates

CLIENT EVENT CALENDAR

RSVP: 407-389-1122 (24 hours) or reservations@estateandbusiness.net

NOW TAKING RESERVATIONS FOR ALL EVENTS, SO CALL TO RSVP EARLY! SPOUSES AND GUESTS WELCOME TO MOST EVENTS. INVITATIONS WILL BE SENT PRIOR TO EACH EVENT WITH FURTHER DETAILS.



FEB 23rd

*State of
the Market*



MARCH 11th

*Lunch &
River Cruise*



APRIL 17th

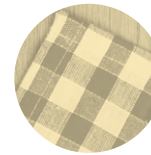
Shred Day



APRIL 22nd & 23rd

Captain's Party: April 22nd
Tournament: April 23rd

*Ft. Pierce, Off Shore
Fishing Tournament*



MAY 1st

Family Picnic



JULY 22nd

Half Time Report



AUG 3rd

Bowling



DEC 11th

Christmas Party



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FLORIDA RETIREMENT SYSTEM-FRS

SOCIAL SECURITY MAXIMIZATION

457 DEFERRED COMP PLANNING

LUMP SUM IRA PLANNING

IRA & 401(K) MANAGEMENT

PENSION & DROP PLANNING

ESTATE PLANNING

TAX PLANNING STRATEGIES

MONEY MANAGEMENT

SHAREHOLDER MEETINGS

QUARTERLY/SEMI-ANNUAL REVIEWS

LIFE INSURANCE ANALYSIS

RETIREMENT INCOME PLANNING

PLANNING FOR ELDER PARENTS

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