



FINANCIAL SERVICES SPECIALISTS

[www.DropHelp.com](http://www.DropHelp.com)

# *Save the Dates*

## 2024 CLIENT EVENT CALENDAR

RSVP: 407-389-1122 (24 hours) or [reservations@estateandbusiness.net](mailto: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 29<sup>TH</sup>

*State of  
the Markets*



MARCH 28<sup>TH</sup>

*Lunch &  
River Cruise*



APRIL 27<sup>TH</sup>

*Shred Day*



APRIL 28<sup>TH</sup>

*Family Picnic*



MAY 6<sup>TH</sup> & 7<sup>TH</sup>  
Captain's Party May 6th  
Tournament May 7th

*Ft. Pierce Off Shore  
Fishing Tournament*



JULY 25<sup>TH</sup>

*Half Time Report*



AUG 5<sup>TH</sup>

*Bowling*



DEC 14<sup>TH</sup>

*Christmas Party*



# *Value Added Services of Estate & Business Planning Group, LPA*

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

LONG-TERM CARE PLANNING

PLANNING FOR ELDER PARENTS

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