Introducing the . . .

2010 BMAGC Financial Education Series

Overview

Created in collaboration with a distinguished faculty of practitioners in estate planning, tax law, philanthropy, investments, financial planning, risk management, and generational wealth planning, this financial educational series is designed to offer you best practices for preserving and managing your financial assets.

This coordinated series covers four distinct components of your financial life:

Investment Assessment- Estate Evaluation- Retirement Strategies- Risk Management

One workshop in each series will be offered per trimester enabling you to build your knowledge through the course of the year.

The Series

Each event stands alone as a unique experience designed to help you make key decisions on your planning efforts. As the presenters guide you through a journey of discovery, you will be exposed to a variety of topics, each thoughtfully explained.

Investment Assessment Series

In these uncertain times, it is imperative that you take a second look at your portfolio. How should you invest your money? Are you taking too much risk?

This series is designed to offer guidance on managing your money during unpredictable times.

Come discover specific strategies designed to take advantage of the current environment while managing downside risk.

1. *Parable of the Stock Market Sower*
2. *Investing Your VIP & IRA*
3. *Growing and Preserving Your Wealth in Uncertain Times*

Estate Evaluation Series

Everyday 6500 people die in the United States, 3200 die without a will - leaving loved ones behind to sort everything out.

This series is designed to help you understand the key estate planning decisions you need to make in order to update or complete your estate plan!

Come discover how to avoid common mistakes, reduce taxes, and harness the advantages of advanced strategies.

1. *Estate Planning 101*
2. *Estate Planning for Married Couples*
3. *Disinheriting the IRS*

Retirement Strategies Series

The retirement landscape has changed forever. While people are retiring younger and enjoying more active lifestyles, one simple fact remains – your money needs to last! The Retirement Planning Series is designed to help you understand how to manage and create your ideal retirement!

Come discover how to create a sustainable portfolio withdrawal rate, how to create lifetime income, and how to leverage specific features of IRAs, ROTHs, and your VIP.

1. *Retirement Planning*
2. *Income for Life*
3. *Retirement Account Tax Bomb*

Risk Management Series

As the US population ages we will confront a new set of risks including the cost and availability of health and long term care services. As the demand for those services increases – so should the costs. Are you prepared?

Come discover how to maximize your benefits, protect your family, and understand your options with respect to long term care, health care, and elder care services.

1. *Long Term Care Planning*
2. *Health Care Planning*
3. *Elder Care Forum*

*In addition, **Special Events** will be added each Trimester to accommodate unique opportunities and other timely issues. Dates and time to be announced.*

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2010 BMAGC Financial Education Series

Trimester 1

	January		February	March	April
Title	*Parable of the Stock Market Sower*	*Tax & Legal Updates*	*Estate Planning*	*Retirement Planning*	*Long Term Care Planning*
Series	Investment	Special	Estate	Retirement	Risk
Date	13-Jan	20-Jan	17-Feb	24-Mar	21-Apr
Time	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm
Location	TBD	Skyline Tower	TBD	Skyline Tower	TBD
Faculty	Smead	Doug Philips	Morgan Stanley	Capital Planning	TBD

Trimester 2

	May		June	July	August
Title	*Investing Your VIP & IRA*	*Guest Money Manager*	*Estate Planning for Married Couples*	*Income for Life*	*Health Care Planning*
Series	Investment	Special	Estate	Retirement	Risk
Date	12-May	19-May	9-Jun	14-Jul	18-Aug
Time	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm
Location	Skyline Tower	Skyline Tower	Skyline Tower	TBD	TBD
Faculty	Capital Planning	Multiple Faculty	Capital Planning	Morgan Stanley	TBD

Trimester 3

	September		October		November	December
Title	*Growing and Preserving Wealth In Uncertain Times*	*Hold on to Brain Power*	*Disinheriting the IRS I*	*Disinheriting the IRS II*	*Retirement Tax Bomb*	*Elder Care Forum*
Series	Investment	Special	Estate	Estate	Retirement	Risk
Date	15-Sep	22-Sep	13-Oct	20-Oct	10-Nov	8-Dec
Time	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm	11 am - 2 pm
Location	TBD	TBD	Skyline Tower	Skyline Tower	Skyline Tower	Skyline Tower
Faculty	Morgan Stanley	Morgan Stanley	Seattle Childrens	Seattle Childrens	Capital Planning	Multiple Faculty