



Breakout Session *Protecting your Life's Work and Savings*

Session Notes:

Jim Quandt:

- Poor market conditions force untimely distributions:*
- Unforeseen and/or controllable risks:*

Bill White

- Estate Planning: Covering the Basics:*
- Balancing Retirement Planning vs. Estate Planning vs. Charitable Planning:*
- Things you can do to minimize Estate, Gift and Capital Gains taxes:*
- Elements of a Flexible Estate Plan that can adapt to tax law changes:*
- Long term care planning:*



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