

WEALTH BEYOND YOUR LIFETIME

Ensuring Financial Security for Future Generations



LEWES PUBLIC LIBRARY

111 Adams Ave | Lewes, DE



THURSDAY, NOVEMBER 14

10:00 – 11:00 AM



SCAN TO REGISTER

or call

410-677-4848

OVERVIEW:

This course will provide in-depth information on using 529 plans to fund education for children, grandchildren, and future generations through Dynasty 529. The session emphasizes the importance of financial stewardship and covers practical strategies to minimize estate taxes and maximize the impact of assets on future beneficiaries. By equipping participants with tools to navigate complex financial landscapes, the class empowers them to leave a lasting legacy far beyond their lifetime.

TOPICS COVERED:

- Using Dynasty 529 Plans for Multi-Generational Education Funding
- Strategies to Minimize Estate Taxes and Maximize Beneficiary Impact
- Empowering Financial Stewardship and Creating a Lasting Legacy

INSTRUCTOR:



Sandra Warren, CFP®
Financial Advisor

