WEALTH BEYOND YOUR LIFETIME

Ensuring Financial Security for Future Generations



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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.



INSTRUCTOR:

Sandra Warren, CFP[®] Financial Advisor

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



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