BANK OF AMERICA

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You are cordially invited to

Estate Planning & Tax Strategies for the Affluent during Uncertain Times

A Virtual Seminar for CPE Credits featuring Bank of America Private Bank and Rubin Hay PC

HOSTED BY

Peter Balesano
Senior Vice President, Market Leader
Bank of America Private Bank

FEATURING

Merek Rubin, J.D.
Head of Estate Planning
Rubin Hay PC

Henry Greenberg
Managing Director, Wealth Planning Advisor
Bank of America Private Bank

THURSDAY, JUNE 25, 2020

11:00 a.m. – 12:30 p.m.

WEBEX MEETING

To confirm your participation, please click on this **Webex link** by June 23.

Participant dial-in: 855-381-8332; passcode: 283 351 97#

ABOUT THE EVENT

Join us for an informative presentation about Estate Planning & Tax Strategies for the Affluent during Uncertain Times. Topics to be covered include:

- Preserving and transitioning assets within affluent families
- Taking advantage of depressed valuations for gifting strategies
- Transaction planning for business owners

1.5 CPE credits will be available for attendees