



Planning for Partners in VC, PE and Angel Investors

A deep dive into planning for VC & PE partners and angel investors, focusing on tax mitigation, trust solutions, and best practices

Hosted by: Presidio Partners

Warren Coughlin, CFP® Senior Vice President

Speakers: Ann Bjerke, Head Advanced Planning Advanced Planning Group -UBS

Tuesday, September 19th from 11-11:45am PT

RSVP to receive a calendar invite

RSVP by Tuesday Sept. 19th
Sam Bloom
310-734-0821
samantha.bloom@ubs.com



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