



Year End Planning for Entrepreneurs

Things to think about before year end, planning opportunities and changes to be aware of next year

Hosted by: Presidio Partners

Warren Coughlin, CFP® Senior Vice President

Speakers: Lora Cicconi, Senior Income Tax Strategist
UBS

Wednesday, October 9th from 11 - 11:40 am PT

RSVP to receive calendar invite

RSVP by Tuesday Oct 8th

Sam Bloom

310-734-0821

sam.bloom@ubs.com



Important information about brokerage and advisory services.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at ubs.com/relationshipsummary, or ask your UBS Financial Advisor for a copy.

UBS Financial Services Inc., its affiliates and its employees are not in the business of providing tax or legal advice. Clients should seek advice based upon their particular circumstance from an independent tax advisor.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements. © UBS 2024. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. D-UBS-40EAE87A

Approval date 7/7/2024
Expiration: 7/31/2025
Review Code: IS2403404

