

Advanced Planning for Startup Founders

A deep dive into planning for startup founders, focusing on tax mitigation and trust solutions

Hosted by: Presidio Partners

Warren Coughlin, CFP® Senior Vice President

Speakers: Rebecca Sterling, Senior Wealth Strategist - Advanced Planning Group -UBS

Wednesday, April 16th from 11-11:45am PT

RSVP to receive a calendar invite

RSVP by Tuesday April 15th

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Approval date 7/15/2024

Expiration: 7/31/2025

Review Code: IS2403553

