



Planning for Partners in VC, PE & 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®, FA-PWM, Senior Vice President – Wealth Management

Speakers: Lora Cicconi, Tax Efficiency Planning Strategist – UBS Financial Services Inc.

Wednesday, September 24th from 11-11:45am PT

RSVP to receive Teams meeting details

RSVP by Tuesday Sept. 16th

Natalie Traylor

natalie.traylor@ubs.com



Presidio Partners
UBS Financial Services Inc.
2000 Avenue of the Stars, 7th Floor North
Los Angeles, CA 90067
[Team Website](#)
310-734-2395

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