



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®, FA-PWM, Senior Vice President
– Wealth Management

Speakers: Casey Verst, Senior Wealth Strategist – UBS
Financial Services Inc.

Wednesday, November 12 from 11 - 11:45 am PT

RSVP to receive Teams meeting details

RSVP by Tuesday Nov 11
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

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 circumstances from an independent tax advisor.

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP® (with plaque design) in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.

This presentation is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be those of UBS Financial Services Inc. UBS Financial Services Inc. does not verify and does not guarantee the accuracy or completeness of the information presented. 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, and 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.

