



Founder Pre-Liquidity Planning Dinner

A dynamic dinner panel featuring the founders of Promissory and O'Larry offering practical perspectives on QSBS planning and tax-efficient wealth preservation strategies.

Hosted By: **Presidio Partners**

Speakers:

Warren Coughlin – Senior Vice President, Private Wealth Advisor, UBS

Brian Lamb – Founder, Promissory (previously founded Trust & Will)

Corey Heldreth, CPA – Founder of O'Larry Tax

When: **Thursday, October 1st at 6:30pm**

Where: **Perbacco San Francisco – 230 California St, San Francisco, CA 94111**

