

Estate Planning & Charitable Giving

FREE Workshop

Thurs., Nov. 16th, 2017

at

6:00 PM

Come to this **FREE workshop** where you can learn how your financial portfolio can reflect your CHARITABLE GIVING and how an ESTATE PLAN can protect your intentions. Having a trust done correctly is a crucial factor in making sure your family and your assets are protected for the future. Make sure your favorite charity is a part of your plan.

Key points that will be covered:

- Why do you need an Estate Plan
- Effective instruments of Charitable Giving
- Asset Protections and Legacy building
- Effects of capital gains when selling a highly appreciated asset
- Why a will alone cannot protect your assets and your family
- Protect your children's inheritance from lawsuits and divorce.
- Do you need to supplement your income now or later
- Discover how to legally avoid ALL estate taxes and probate

Event Location

The Soto Law Group

[1101 Dove Street, Suite 200](http://1101DoveStreet.com)
[Newport Beach, CA 92660](http://NewportBeach.com)

Registration Required!

This workshop is FREE to attend but you **MUST register**. Light refreshments and appetizers will be served. **Register at:**

OR CALL

888-735-7686

Space is limited!!

Reserve your spot today!

Hosted and Presented by



R. DeDe Soto, Esq.

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Trusts • Estates • Families • Business



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NEWPORT ADVISORY
Financial Counsel

About R. DeDe Soto

With more than 15 years of legal experience, R. DeDe Soto is able to provide knowledgeable advice and skilled representation for her clients. DeDe is focused on providing tailor-made legal solutions that protect the assets and wishes of her clients.

About Mary Dee Foft

Mary Dee has 28 years of experience in the financial services industry and joined Newport Advisory in 2014 as a financial advisor. She cares deeply about helping clients create a legacy for their loved ones and the causes that matter to them.