



**Patriot Tax &
Associates, LLC**

PRESENTS

Financial & Legal Planning for Millennials



Choose from 2 dates:

Thursday, September 8 at 6:30pm

Saturday, September 10 at 10am

Willoughby Hills

Community Center

{Historical Room}

35400 Chardon Road

Willoughby Hills, OH 44094

*on Route 6 just east of 91

(across from the fire station)

Attorney Gina M. Bevac-Ciani will discuss:

1. What estate planning is and how your assets transfer at your death
2. Why you need a Will, Power of Attorney and Health Care Directives
3. The importance of using trusts for families with minor children

Jack Malarik will explain how to keep your budget and be able to have money for retirement. A limited number of attendees will receive a "Budgeting Made Simple" Financial binder.

RSVP

(P) 216-486-9800 or (E) taxinfo@patriotcpa.com

Seating is limited. Please call or email to reserve your seat. We encourage you to bring a friend you feel may benefit from this information



THRASHER
DINSMORE
& DOLAN

A Legal Professional Association

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Investment advisory services are offered through Summit Wealth Partners, LLC, an SEC Registered Investment Advisor. Insurance products are offered through Malarik Financial Services, a separate entity not affiliated with SWP.