



Family Wealth: Give Now or Leave for Later?

JOIN US FOR

Lunch and Learn

CONVERSATIONS THAT MAKE A DIFFERENCE



Friday, October 23, 2026
11:00 AM – 1:00 PM



3rd floor Conference Room
6101 Bollinger Canyon Rd., San Ramon
Ca 94583



GUEST SPEAKER:

Robert J. Silverman, Attorney at Law
Silverman & Jaffe



HOSTED BY:

Marilyn Suey, CEO and Founder
The Diamond Group Wealth Advisors

CERTIFIED FINANCIAL PLANNER®
Certified Exit Planning Advisor®
Accredited Investment Fiduciary®
Certified Plan Fiduciary Advisor®

Your Key Takeaways:

01.

Understand the Pros/Cons of making Lifetime Gifts

02.

Understand valuable Creditor and Marital Protection for Loved Ones

03.

Tips on ways to reduce or defer Income Tax on the Sale or Gifting of Appreciated Assets



REGISTER NOW



More info and registration on the QR code or reach out to Chloe.



925-219-0080



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Robert Silverman and Silverman & Jaffe, P.C. are not affiliated with The Diamond Group Wealth Advisors or LPL Financial.

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MISSION : WEALTH

**Schedule your FREE
confidential and
meaningful conversation
with Marilyn today.**



**Call 925-219-0080
Text 925-744-8060**

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**You Don't Have to Navigate Life's
Major Changes Alone**

WE CAN HELP YOU NAVIGATE:

- Receiving an inheritance
- Retirement or career shifts
- Selling a business
- Divorce or separation
- Considerations for blended families
- Loss of your beloved
- Planning for your legacy
- Caring for your aging parents

Every new chapter begins with a conversation. With the right guidance, you gain clarity, understand your options, and move forward with greater confidence.

**It doesn't matter where you are.
All you need to do is START.**

Let's Talk

Marilyn Suey

Founder and CEO
The Diamond Group Wealth
Advisors



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