You are invited to attend...

Finding Financial Balance

Merging strategies of asset allocation with tax-diversity

Join us for this informative session on Wednesday, August 19th at 5pm

Register in advance for this meeting:
https://nylife.zoom.us/meeting/register/tJYlc-6hqDktHNTmao_aGisK5MnuZ8MF17Q0

What You Will Learn:

Most people today practice some form of “vertical diversification,” that is, diversification of risk. But risk allocation is just part of the story.

This interactive workshop will help attendees discover the value of proper “horizontal diversification,” that is; diversification between tax treatments; the potential rewards associated with such a strategy; and how to integrate the concept into their own personal planning.

MACRO ASSET PERSPECTIVE®

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