RBC Rochdale

OSWEGO
PRIVATE WEALTH MANAGEMENT

YOU'RE INVITED

Advanced Planning Insights for Business Owners

Tuesday, October 6th, 2026
Lunch at 11:30am
OR
Dinner at 5:30pm

The Foundry at Oswego Point
320 Oswego Pointe Drive
Lake Oswego, OR 97034

As a business owner, what you build and what you keep are two different challenges. You've poured time and energy into your company's success — but growth and protection require different strategies.

Join us for a candid discussion on how business, tax, estate, and financial planning can work together to strengthen enterprise value, reduce tax liabilities, and preserve wealth. Our speakers will share practical strategies to help you protect what you've built, close key planning gaps, and create greater freedom, wealth, and lasting impact.

Every attendee will also receive a complimentary Enterprise Health & Value Assessment following the session—giving you a clearer picture of where your business stands today and where your biggest opportunities lie.

To RSVP, Please Click Here.

Non-deposit investment products are not FDIC insured, are not bank guaranteed, and may lose value.

Hosted By:



Joe Jraitiny, CFA, CPWA®
Managing Director,
Senior Investment Consultant
RBC Rochdale



Bob Bedritis, CEPA®
Founder and Managing Director
Oswego Private Wealth Management

Featured Speakers:



John Dwyer, CPA/PFS, CFP®, CEPA®
Head of Private Wealth Solutions
RBC Rochdale



Colin Bowman
Partner,
Cultivate Brands

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