

You're Invited to a Complimentary Dine & Discuss Event!



Understanding Estate and Retirement Planning Tax Strategies

IRA, Roth IRA, 401(k), and Other Retirement Plans:

Is your current plan effective? Can you minimize the devastating effects of income, gift and estate taxes?
Will your retirement income stream last as long as your retirement does?

Estate Planning:

Does your estate plan deal with the double taxation of retirement plans? Are you aware of the tax law changes made under the Trump administration? Do you have questions about estate and gift tax planning for IRAs and other qualified assets?



Trusted Advisors for Generations

JANNEY MONTGOMERY SCOTT LLC
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A well-crafted retirement and estate plan, which gives you control of preserving and transferring your assets, should always be a part of your overall wealth planning strategy.

JOIN US FOR A COMPLIMENTARY DINNER
ON ONE OF THE FOLLOWING DATES:

Tuesday, 10/23 or Wednesday, 10/24 at 6:30pm

6 Paupers Tavern & Restaurant, 7465 Lancaster Pike, Hockessin, DE

RSVP to Michael Toner at 302.428.5991 or mtoner@janney.com by October 18th
Seating is limited to the first 20 guests as dinner will be served.

Event Hosted By and Featuring:

Michael E. Toner, Vice President/Wealth Management at Janney Montgomery Scott LLC

Michael is a dedicated financial service professional who has been in the Financial services business since 1992 and is committed to delivering exceptional client service and fostering long-term relationships.



Wayne C. Buckwalter, ESQ. of Cohen Seglias Pallas Greenhall & Furman PC.

Wayne is an experienced income, gift and estate taxation, wealth transfer and business succession planning presenter. His practice emphasizes the practical and innovative planning and settlement of estates, including the creation of Revocable Trusts, Limited Partnerships and the structuring of asset ownership, life insurance and retirement plans to creatively achieve optimal income and estate tax savings.

