

# Strazzeri Mancini & NAIFA Present: Advanced Planning Workshop Series *Powered by the Southern California Institute*

This workshop series, presented by Strazzeri Mancini and NAIFA and powered by SCI, is for advisors, planners, and professionals seeking to deepen their knowledge in estate, business, tax, charitable planning, and asset protection strategies. Attendees will explore key drivers of advanced planning conversations and integrated strategies to deliver impactful solutions to business owners and high-net-worth clients.

## Unlock New Possibilities in Estate, Tax, and Business Planning

Join us for a dynamic workshop series tailored for advisors who want to bring real value to their clients through strategic, integrated planning.

This in-depth series explores:

- Advanced estate planning strategies for high-net-worth individuals and business owners
- Integrated personal and business legal, tax, and financial planning
- Timely updates on legislation, estate tax exemptions, and interest rates
- Techniques to minimize taxes on business sales and increase client cash flow
- How to position yourself as a vital part of your clients' long-term planning teams

Don't miss this opportunity to strengthen your planning expertise, expand your client value, and collaborate with the industry's top professionals.



### June Guest Speaker:

#### Joe Strazzeri, Esq.

Conselor and Attorney for Successful Families and Business Owners.  
Educator for Wealth Advisors. Speaker and Author.

## June Session Info

Topic: Key Conversation Drivers  
and Planning Opportunities

Date: June 25

Time: 11:30am - 2:00pm

## Cost

\$35 for NAIFA Members

\$45 for Non-Members

*Includes lunch and parking!*

## Location

Southern California Institute  
(Located in the UCSD Building)  
6256 Greenwich Dr, Suite 115,  
San Diego, CA 92122

*There is a 3-level parking structure with  
free and ample parking*

## Additional Session Dates

August 27, 11:30am - 2:00pm

November 5, 11:30am - 2:00pm

*The series will also feature timely legislative and economic updates from NAIFA Affiliate Leader, Marc Sigmon.*