



Savvy tax strategies for your retirement

Learn how to create an efficient tax strategy

Learn how to avoid common mistakes when it comes to your investment portfolio, health care and estate strategies. The Savvy Tax Strategies workshop provides answers to critical tax questions you must answer before retirement. Explore how to help dodge the Social Security “tax trap” and learn more about the recently passed SECURE Act.



Event details

Tuesday, March 15, 2022, 11:00 a.m.

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Cleveland Heights Country Club
2900 Buckingham Ave
Lakeland, FL

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Lunch will be served.

Dinner will be served.



Reserve your place today

Space is limited! RSVP by March 2, 2022. Call Phyllis at 863-337-4894 or email phyllis.allmon@thrivent.com.



Your host

Your local financial advisors, Tracy and Chris, and office manager, Phyllis. Presenting with guest speaker Mike Fuehrmeyer, Financial Consultant from Thrivent joining us virtually. Join us for food, fellowship, and door prizes. Bring a friend for extra chances to WIN!.

Mike Fuehrmeyer, Financial Consultant with Thrivent joining us virtually. Join us for food, fellowship, and door prizes. Bring a friend for extra chances to WIN! is not affiliated with or endorsed by Thrivent. The views expressed in this presentation by Mike Fuehrmeyer are their own and not necessarily those of Thrivent or its affiliates. The material presented has been obtained from sources we believe to be reliable and is current.

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