You are cordially invited to attend a Roundtable on…

Tapping into Retirement Accounts to Build an Income Stream

Presented By: George F. Vieth Financial Advisor

Date: 11/4/2024 11:30am to 12:45pm Lunch will be served

Location: Mountain City Club 216 West 8th Street Chattanooga, TN 37402

How and when wealthy clients draw down their various retirement funds is a critical planning topic with numerous tax, legal, and investment implications.

This one-hour roundtable event will bring together financial advisors, CPAs, attorneys, and other local professionals for a "working lunch" to share expertise on how to tap into retirement accounts and build a sustainable asset withdrawal strategy for retirement.

After completing the Roundtable, you will know:

- The ultimate purpose of retirement income planning
- The 4 biggest risks clients face in retirement
- 4 approaches for designing a retirement income plan
- Transition planning: When to take distributions & liquidate assets
- How to customize income solutions for each client

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COI Roundtable Policies

Cancellation policy: This workshop is free. Please contact the presenter to cancel.

To make a complaint, or for more information about program cancellation policies, please call Horsesmouth Member Support at (888) 336-6884.

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Pre-registration Required

Registration for this workshop is available at [website address] or 423-267-6858 ex 1 for the reservation mailbox.

Workshop attendees earn up to one hour of CPE credit in Finance.

Additional Information:

Prerequisites: None

Who Should Attend?

CPAs
Attorneys
Other allied professionals

Advanced Preparation: None necessary, although a basic understanding of retirement accounts is helpful.

Program level: Basic

Delivery method: Group-Live

Seating is limited. Please call 423-267-6858 ex 1 for the reservation mailbox to reserve your space or visit (website address).