



PRESENTS

Six Planning Ideas for 2021 and Beyond

PLEASE JOIN US

March 25th 2021 11:45am
Dolphin Bar & Shrimp House

1401 NE Indian River Drive
Jensen Beach, FL 34957

PLEASE RSVP BY

March 19th 2021

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Doors will open at 11:45 am. Lunch will be served at 12:00 pm. The presentation will begin promptly at 12:30 pm.

The year in review and a look ahead to 2021. There are specific actions to consider in the coming year. Recent legislation such as the SECURE Act and Tax Cuts and Jobs Act will impact planning this year and next.

During this seminar, we'll cover:

- **5 financial themes and lessons from 2020**
- **Market and economic predictions for 2021**
- **6 planning ideas you need to be aware of this year**
- **The importance of a "three-legged stool" portfolio**

Cummings Wealth Management and Dolphin Bar will follow all COVID-19 regulations and protocol including :

- **Temperature Checks**
- **Social Distancing**
- **Limiting Capacity**
- **Providing Masks if needed**

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.
The economic forecasts set forth at this event may not develop as predicted and there can be no guarantee that strategies promoted will be successful.