



The Rockford Chapter of the National Association of Insurance & Financial Advisors and the Financial Planning Association of Illinois invite you to our January Luncheon

Tax Reform: Planning and Implications

One Hour of CE credit is available!

Our guest speaker will be John Bradley, CPA, MAS, Tax Senior Manager for RSM US LLP.

The presentation will cover tax reform provisions, the implications to individuals and businesses, and planning ideas in response to tax reform. If significant tax reform is not expected, then tax changes for 2018 under existing code will be addressed along with general planning ideas.

Attendees should walk away with a list of talking points and planning points to steer client conversations centered on a consultative tax planning approach.

John has 13 years of tax consulting, compliance and planning experience working primarily with closely held family businesses and individuals. He works extensively with the wealth management practice at RSM to provide comprehensive tax, estate, gift, business succession, and retirement planning.

Date: January 10th

Time: 11:30 -12:00pm Registration and Networking, 12:00 -1:00pm Presentation

Location: Giovanni's Restaurant, 610 N. Bell School Road, Rockford

RSVP: Advance Registration is required. Email holly@massinofinancial.com to reserve your seat!

We look forward to seeing you!