



SPEAKING OF SENIORS
Presented by the Senior Focus Committee

Name of Presenter: Ronshan A. Longani, CFP

Position at Organization: Financial Advisor

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Language Spoken Fluently: English

Presentation Category: Financial Issues

Topic	Key Points	Experience/Expertise with This Topic	# of Times Spoken on this Topic
I. Estate Planning	Wills Trusts Prubate	Working w/ clients on estate planning CFP	5+
II. Income Distribution	Using 401K's, IRA's and investment accounts to withdraw funds Do not run out of money	Work with clients CFP	10+
III. Investment Strategies	Investment Mix Tax Strategies	Client Portfolios CFP	20+

Preference for Speaking Engagements

Days of Week Preferred to Speak: Sunday-Friday

Times: Morning, Noon, Afternoon, Evening

Availability to Speak: As Needed

Type: Seminar