



The AWSCPA New Jersey Affiliate

is Pleased to Present

Financial Planning Panel

Date and time: Wednesday, October 20, 2010
6:30pm – 8:30pm

Location: **Hanover Manor**
16 Eagle Rock Avenue
East Hanover, NJ 07936
(973) 887-2682

Admission: \$30 for members/ \$40 for non-members

Objective:

Our three panelists will provide a brief history of their experience in their respective fields. Then, they will answer your financial planning questions and offer their expert advice. Moderated by Beth Manzi, Past President.

Meet the Panelists:

Deirdre Wheatley-Liss, Esq: estate planner and attorney with over 15 years of experience. She concentrates in business, tax, and estate planning.

Lester Wigler: financial advisor at Morgan Stanley Smith Barney with over 30 years of experience. He focuses on working with business owners, corporate executives, families and endowments.

JoAnn Ralph, CPCU, CIC, CRM: principal at Rothstein Kass' Business Advisory Services practice. With over 35 years of experience, JoAnn will discuss her experience helping small businesses with insurance and risk management.

If you have any questions you would like answered by the panelists, please email Beth Manzi at bethmanzi@yahoo.com.

Learning objectives: To develop an understanding of estate planning, financial advising and risk management.

Prerequisites: None

Program Level: Basic

Program Content: Discussion of the various financial topics through a question and answer session

Advance Preparation: None

Instructional Method: Group-Live Program

Field of Study: Accounting

CPE Credits: 1



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The AWSCPA-NJ aims to integrate the values of the national professional society of women CPAs into our New Jersey affiliate and offer networking opportunities, leadership skills and advice, and an opportunity to enhance your ability to succeed in your career. If you are interested in becoming a member or would like more information on the AWSCPA New Jersey Affiliate, please visit our website at www.awscpa.org/nj. For membership questions, please contact Erin Booth at awscpa.nj@comcast.net.