ROUNDTABLE: Investment Strategies and Best Practices for Accumulating Wealth

January 20, 2016

Investment Strategies and Best Practices for Accumulating Wealth

Breakfast Roundtable Discussion - Wednesday, January 20, 2016

The fifth topic in the Business Owner's Guide to Survival, Growth and Wealth roundtable discussions will focus on "Investment Strategies and Best Practices for Accumulating Wealth." This session will assist you with:

- Coordinating tax accounting, estate planning and investment strategies
- Understanding family balance sheets and how assets are titled
- Designing investment strategies to match income and return objectives
- Preserving capital to meet both short term cash needs and longer term "real" buying power
- Constructing portfolios with diversified, high-quality businesses to best match objectives

The discussion will be led by:

- **Cameron H. Burns**, Principal and Portfolio Manager, Bradley, Foster & Sargent, Inc.
- **Matthew B. Terzian, CFA, CFP**, Vice President, Bradley, Foster & Sargent, Inc.

January 20, 2016
7:30 a.m. - 8:00 a.m.: Registration and networking
8:00 a.m. - 9:00 a.m.: Breakfast and discussion

Pullman & Comley, LLC
90 State House Square, 14th Floor Boardroom
Hartford, CT 06103

To register, please email: roundtable@pullcom.com or call 860.424.4343.

PULLMAN & COMLEY

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Professionals

Morris W. Banks

Practice Areas

Business and Finance

Trusts and Estates