

# *Financial Security by Design*

*Planning and Compliance for Individuals, Trusts and Estates*

## Planning for Retirement

Under construction – up soon!

Sustainable Withdrawal Rates in Retirement, and how alternative strategies affect the heirs. [Download the PowerPoint presentation.](#)

2007 Personal Financial Planning Conference, Los Angeles  
July 25 and San Francisco July 26. California CPA Education  
Foundation.

AAII East Bay Special Interest Group, August 2, Orinda, CA.

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March 3, 2010.

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CERTIFIED FINANCIAL PLANNER™ - ENROLLED AGENT - REGISTERED INVESTMENT ADVISOR

852 Acampo Drive, Lafayette, CA 94549-5040

(925) 299 - 0472    FAX (925) 299 - 0473    [lingane@post.harvard.edu](mailto:lingane@post.harvard.edu)    [www.lingane.com/tax](http://www.lingane.com/tax)