

Financial Security by Design

Planning and Compliance for Individuals, Trusts and Estates

Planning for Retirement

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.

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

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