



A TIAA Financial Essentials webinar

Tax planning in 2019

It is that time of year, when taxes are on our minds. Many of us will have just filed our income tax return and will want to think about income tax planning strategies for 2019. We also want to know if estate, gift or generation skipping transfer (GST) taxes will impact our planning. Join us to learn some common strategies to help leave more for you and for your heirs.

Register today for this live webinar on Tuesday, April 16, 12 p.m. to 1 p.m. (ET).

Featured speakers:

James M. Alverson, CFP®

Director, Wealth Planning Strategies
TIAA Individual Advisory Services

Daniel C. Bollini

Director, Wealth Planning Strategies
TIAA Individual Advisory Services

As Directors of Wealth Planning Strategies for TIAA, both James and Daniel provide comprehensive wealth transfer, estate and tax planning considerations for clients with the most complex needs. Their tax and estate planning knowledge and backgrounds allow them to provide high-net-worth families with specialized advice and sophisticated planning strategies for every aspect of their financial lives.

Want help?

- It's quick.**
- It's easy.**
- It matters.**

[Schedule online](#)

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