



DISTRIBUTING WEALTH

Tuesday, January 21st
12:00 PM



Emily Drake, CFP[®], AEP[®]
Fairport/Luma Wealth Advisor



Tom A. Seifert, CPA, PFS
Fairport/Luma Wealth Advisor

Join Fairport & Luma Wealth Advisors Emily Drake and Tom Seifert for an interactive workshop where they will provide you with insights about wealth distribution, including:

- How to determine if you need an estate plan
- The documents that make up an estate plan and the purpose they serve
- Strategies for minimizing taxes and fees for your heirs
- Tips for creating a priceless legacy for your heirs

You'll also receive empowering tools that can help you leave the legacy you choose.

Fairport/Luma Wealth Office
1350 Euclid Ave, Suite 400
Cleveland, OH 44115

This event is the first in our 2020 Wealth & Wellness Lunch and Learn Series, intended to educate our audiences on staying healthy, both financially and physically, throughout the year.

A healthy lunch and complimentary valet parking will be provided.

We hope you'll join us — and bring a friend!

rsvp@fairportwealth.com or (216) 431-3000