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From: AAll Rochester <aaiirochester@gmail.com>
To: AAll Rochester <aaiirochester@gmail.com>
Subject: February 15, 2017 - Rochester AAll Chapter Financial Planning SIG - MEETING AGENDA

Agenda: Wednesday, February 15 - AAll Financial Planning SIG

Our next AAll Rochester Chapter Financial Planning SIG meeting will be held on Wednesday February 15, at the Penfield Public Library's Ruth Braman Conference Room, 7-9PM. The Library is located at 1985 Baird Rd., Penfield 14526.

1. February 15 Program

"Financial Health" by Jim Terwilliger, PhD, CFP, Senior Vice President, Financial Planning Officer, Wealth Strategies Group, Canandaigua National Bank and Trust Company. At this meeting, Jim will cover tax law changes Congress made in December 2016, changes in income-related tax/fee thresholds in the Federal income tax, and any tax-related changes of interest; Qualified Charitable Distributions from IRAs (refer to his article from 55 Plus magazine, September/October 2016 issue); and how to set up memorial funds,

2. March 22 Program

"A Case for Dividend Stocks" by Jeff Fraser, Rochester AAll Chapter Breakfast Club Chair.

Contact Diep Chu at di5215@aol.com if you wish to reply to this email.

Diep Chu
Rochester AAll Chapter Financial Planning SIG, Chair

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