Warren Street Wealth Advisors presents

Financial Planning for Businesses - 05.18.2017

- Tired of paying your “fair share” in taxes?
- Worried your 401(k) plan is full of hidden fees and expenses?
- Frustrated with the time spent on maintaining your retirement program?
- Concerned about low participation rate and/or company morale?
- Unhappy with your 401(k) investment options?
- Furious after discovering corrective distributions?

Come listen to our panel of experts on financial planning for businesses:

Mark Clark - President - Benefit Associates Inc
With over 25 years of experience in designing and administering qualified retirement plans for public and private companies In addition to his broad experience in retirement plan operations and business development Mark provides a strong background in employee development and customer service.

John Hartwig - VP & Senior Relationship Manager - American Business Bank
Commercial Banker located in South Orange County with emphasis on working with privately held companies with $5MM - $200MM in annual sales. John works with companies in: monitoring of credit quality, identifying qualified prospects, credit underwriting, and industry analysis.

Blake Street CFA, CFP® - Chief Investment Officer & Founding Partner - Warren Street Wealth Advisors
A CERTIFIED FINANCIAL PLANNER® and Chartered Financial Analyst, Blake’s expertise is found in comprehensive financial planning, investment management, and investment research. At Warren Street Wealth, Blake leverages his talents to help business owners make sound financial decisions with a long-term focus and tax efficiency in mind.

WHERE

Zov’s - Wine Room

17440 17th Street

Tustin, CA 92780

WHEN

May 18th, 2017

12:00 pm - 1:00 pm

Event is free for business owners and human resource managers. We only have room for 30 so please RSVP

Warren Street Wealth Advisors

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Tustin, CA 92780

RSVP by phone or email - info@warrenstreetwealth.com

714-876-6200

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