Are you making the most of your money, or giving too much away in taxes? Join us for an eye-opening tax planning seminar where Industry experts reveal smart, legal strategies to help you keep more of what you earn. Whether you are a business owner, investor, or simply looking to optimize your personal finances, this session will unlock tools and techniques that can transform the way you think about taxes. It is not just about filing – it is about planning to build lasting wealth.

Let's Talk Tax Planning

Thomas Shelder, CFP®, Founder – Wealth Advisor

Matthew Doran, CFP®, Partner – Managing Director at &Partners

Please join us on either date: July 8, 2025, August 12, 2025, or September 17, 2025, at 5:30 p.m.

Location: HERTHA, 401 River Street, Elk Rapids, MI 49629

(Light refreshments will be served)

CALL TO RESERVE YOUR SEAT

231-974-2208

OR EMAIL TO RESERVE YOUR SEAT

Kim.noble@thirdcoastwealthplanning.com