

Law Offices of Berge & Berge LLP

Call to Pre-Register 408-985-9918

2017 LifePlan Calendar					
Month	Date	Day	Time	Presenter	Topic
✓ January	24 & 26	Tue & Thur	11:00-12:30	Jim	2017 Legal Update Open House
✓ February	22	Wed	11:00-12:30	Nancy Pyzel	Effective Financial Planning
✓ March	22	Wed	11:00-12:30	Richard Lambie	Choosing a Professional Trustee
✓ April	25	Tues	11:00-12:30	Alex Morris	From Technology to Post-Its: Memory Strategies
✓ May	17	Wed	11:00-12:30	Mary Beth Huey and Kimberly Leal	Real Estate: Market Update, Financing Tools and Tax Base Transfer
September	6	Wed	11:00-12:30	Joan McCreary	A Lifetime of Treasures - Discussion: What To Do With Your Stuff as You Age
October	17	Tue	11:00-12:30	Filep Sackx	Financial Planning Workshop: You Name the Topic!
November	15	Wed	11:00-12:30	Cate Miller	Topic: End-of-Year Tax Planning
December	7	Thur	2-5 pm	Staff	Client Appreciation Event - Holiday Open House
2018					
January	23 & 25	Tue & Thur	11:00-12:30	Jim	2018 Legal Update Open House

Please Note: Dates/Times Subject to Change

Updated June, 2017