stern WORD lecture series

SAMPLE TOPICS

ECONOMY & OUTLOOK

- Trumpenomics: What Are Your Next Steps?
- Tsunami: How The Graying of the Baby Boomers Will Drive the Next Economic Decade
- 2017 Market Outlook: Is it Time to Take the Road Less Traveled?

ENTREPRENEUR & SMALL BUSINESS OWNERS

- The Five Financial Mistakes Business Owners Make and How to Avoid Them
- Trump the Competition: Exploiting Current Economic Policy to Build Your Business
- The New World Order: How Politics, Central Bankers and Currency Wars May Impact Your Business

ADVANCED WEALTH PLANNING

- Mastering Your Trilogy: Wealth, Protection & Legacy
- Retirement Rules: The Five Biggest Threats to Your Retirement and How to Avoid Them
- Beneficiary Audit: What You Planned vs. What Will Actually Occur

INSTRUCTOR

Ken Stern & Associates (KSA) is an investment manager and family office. KSA is committed to providing high-quality, effective financial education. Our mission is to enrich, strengthen and empower our trainees to be savvy consumers and astute investors. We present on a variety of financial topics and can customize our education to fit your needs.

OVERVIEW

We aim to discuss, bring clarity, and provide solutions to the key financial issues facing consumers, investors, retirees, small businesses and executives today. With a dynamic economy and the complexities regarding tax, pensions, retirement and legacy planning, we can all benefit from advanced opportunities and solutions for our families and company. Our presentations focus on coaching your employees on some of our strategies designed to help them grow their assets, minimize their tax burden, and preserve their financial legacy. In these busy times, it can be difficult for employees to find time to seek out the information necessary to understand their financial options. We are here to help.

Ken Stern & Associates is a Registered Investment Advisor. KS&A and its employees are not tax professionals, information provided in this publication is not to be considered tax advice. KS&A recommends that you consult a tax or an estate planning professional if you feel that these services are necessary for your situation.

Contact us

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