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9 strategies to help protect and grow your wealth. Learn from financial, legal, and tax professionals with **40+ years** of experience in advising individuals and corporations in the Northeast Ohio area.

BY INVITATION ONLY

# IS YOUR PORTFOLIO READY FOR THE PREDICTED RECESSION? WHAT IF THERE ISN'T ONE?

*Professional panel discussion for families currently retired or near retirement*

COMPLIMENTARY GOURMET MEAL AT LUCA WEST PRIOR TO DISCUSSION



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# IS YOUR PORTFOLIO READY FOR THE PREDICTED RECESSION? WHAT IF THERE ISN'T ONE?

## NINE WAYS TO PRESERVE AND GROW YOUR WEALTH FOR THE CHALLENGES AHEAD

- Why 10 of the last 11 Fed Rate Hikes have ended in Recession.
- How will the recent U.S. Credit and Bank Downgrades Affect Your Retirement?
- How to Identify the Basic Steps to Protect Your Portfolio from a Possible Recession.
- How to Keep More of What You Earn with a Comprehensive Tax Strategy Plan.
- Strategies to Avoid Capital Gains Taxes.
- How to use the Power of Real Estate as a Hedge Investment Tool.
- How to Protect Family Wealth Regardless of Market Conditions.
- How to Avoid Three Common Mistakes in Managing Retirement Income.
- Unique Strategies to Help Generate Reliable Retirement Income.

### YOUR PROFESSIONAL PANEL:



**James S. Lineweaver, CFP®, AIF®**  
*Founder & President*  
**Lineweaver Financial Group**  
 CERTIFIED FINANCIAL PLANNER™



**Mark Sipos**  
*Accounting & Tax Specialist*  
**LFG Tax Services, Ltd.**



**DAN BARON**  
*Partner*  
**Baron Law, LLC**



**Jerry Herman, CFA®**  
*President*  
**Wisdom Capital, LLC**

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***October 10***  
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