



Realty Advisors
dunlap & gorman

Introducing...

Estate & Legacy Planning Workshop Series

Join us for an informative webinar where we will delve into the highlights of our new workshop series. Save money, get prepared & strengthen your legacy.



Intro & Foundations 1

Getting Organized 2

Assemble Your Team 3

Legal Preparation 4

Minimize Taxes 5

Invest & Insure 6

Charitable Strategies 7

Prep for the End 8

Review & Refine 9

Communicate 10

- Expert Instruction
- Tools & Guides
- Private 1:1 review
- Family session

Date: April 25th
Time: 6:30 PM – 7:30 PM

Registration required
Visit dgrealtyadvisors.com or
email info@dgrealtyadvisors.com or call 714.255.9998

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