Successfully transferring wealth to the next generation

Family wealth transfers sometimes fail, damaging sibling relationships and affecting the impact you want your assets to have. Join us for a seminar to learn about common mistakes to avoid. We will also discuss tools and resources to help aid the family wealth discussion and how to communicate with clarity.

Hosted by: Community Foundation for San Benito County

Presented by: Grant Martin, MSF & Alexis Winder, Edward Jones Investments

A meal will be provided. Seating is limited.

RSVP

By July 12th at (831) 630-1924 or bweatherly@givesanbenito.org