

REMINDER

GENERAL MEMBERSHIP MEETING

APRIL 17, 2024 AT 7:30 P.M.

VIA ZOOM

LINKS FOR THE MEETING / AGENDA WILL BE SENT
TO YOUR EMAIL.

SPECIAL INVITED GUEST:

CAMILLE DAVIS FROM NEW YORK LIFE INSURANCE



Camille Davis

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“For many of your personal & business needs.”

Business

- Employee benefits
- Key person insurance
- Buy sell agreements*
- Cross purchase agreements*
- Employee whole life
- Retirement planning
- Business succession planning
- Asset protection

*Funded with life insurance

Personal

- Life insurance strategies
- Retirement income strategies
- Risk management
- Wealth transfer strategies
- Long-Term Care insurance
- Education funding strategies
- 401(k) rollovers
- Charitable giving

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