



Personal Financial and Tax Planning in an Era of Uncertainty

01.17.2013

WMACCA Richmond

Offered LIVE at the Williams Mullen Center in Richmond, VA and by Webcast

Presented by Farhad Aghdami of Williams Mullen and Dee Ann Remo, Managing Director at Heritage Wealth Advisors.

With the recent compromise on income tax rates and other tax issues enacted to avoid the "fiscal cliff," many individuals are facing uncertainties about adjustments they may need to make to their financial plans. Will deductions will be eliminated? How large can gifts and estates be before they're taxed? This session will provide insight on what you can do to prepare yourself for what lies ahead. From what you need to know about deferred compensation to understanding the impact of the new additional Medicare tax, we will help you better understand the factors that can make a difference in your financial picture in the new year, including managing qualified and non-qualified deferred compensation benefits, life insurance, and other forms of executive compensation. Farhad Aghdami, chair of the Tax Practice at Williams Mullen, has focused his career on wealth transfer planning and preservation for corporate executives. Dee Ann Remo, Managing Director of Heritage Wealth Advisors, has over twenty-six years of experience providing wealth management planning and services to corporate executives, professionals, and business owners.

Related People

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