

# SUCCESSFUL FINANCIAL PLANNING and RETIREMENT STRATEGIES for SOLO and SMALL LAW FIRMS

Wednesday, November 16

11:45 a.m. to 1:00 p.m.

Bar Office - Lunch & CLE

\$15.00 for PBCBA members



Presented by Brooke McKernan Northwestern Mutual  
The McKernan Financial Group

## 1. SUCCESSFUL FINANCIAL PLANNING FOR THE SOLO AND/OR SMALL LAW FIRM:

What Does that Mean, Practically, to the Practitioner?

## 2. FINANCIAL STRATEGIES THAT CAN BE EASILY IMPLEMENTED

Small Business Buy Sell/ Key Man Strategies. What are the advantages?

## 3. INDIVIDUAL DISABILITY INCOME PLANS FOR PRACTITIONERS AND EMPLOYEES

What are the Pros and Cons?

## 4. RETIREMENT STRATEGIES. AM I SAVING ENOUGH? CAN I SAVE MORE?

Products Available for Additional Retirement Savings

## 5. OTHER NON-QUALIFIED SAVING STRATEGIES

What to do When You are Already Maximizing Qualified Retirement Plans.

## 6. SUCCESSION PLANNING FOR THE SOLO AND SMALL LAW FIRM

**HOW TO  
REGISTER**



**BY CHECK**

Return this  
form



**BY CREDIT CARD**

For security purposes, you must register  
online at [www.palmbeachbar.org](http://www.palmbeachbar.org)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

*Price increases by \$5.00 after 5:00 p.m.*

*on 11.11.16*

*Solo September 2016*

Sponsored by:

**QUEST**  
WORKSPACES

Northwestern Mutual  
The McKernan Financial Group