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CPAs (AICPA) and 360 Degrees of Financial Literacy will host a free webcast on year-end planning.

**Isaac M. O'Bannon** • Oct. 13, 2014

Thinking more about your fantasy football strategy than your personal finance strategy? It's year-end planning season—time to huddle up with your financial team to make sure you're in good shape and won't have a repeat of the financial injuries caused by last year's tax law changes.

On October 20, the [Personal Financial Planning Section](#) of the [American Institute of CPAs](#) (AICPA) and [360 Degrees of Financial Literacy](#) will host a free webcast on year-end planning. An experienced panel of financial practitioners will provide consumers with practical advice and strategies for their own year-end planning. The webcast is free and open to the public.

**What:** A small panel of CPA financial planners will provide practical strategies and tips for year-end planning in plain English. Panelists will explain:

- Impact of recent tax law changes to your estate, taxes, and overall financial plan
- Opportunities to look for with respect to retirement plans
- Tax savings strategies for an efficient investment portfolio
- Actionable strategies to undertake with the guidance of your CPA financial planner before December 31

**Who:** CPA financial planners Susan Bruno, CPA/PFS and David Stolz, CPA/PFS

**When:** Monday, October 20, 2014, from 1-2 p.m. EDT

**How:** Financial professionals can view the webcast or recommend it to their clients. Those interested can [register](#) in advance for the free webinar and will be reminded of

the event by email.

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