

CATAMOUNT WEALTH MANAGEMENT

UPCOMING EVENTS



Catamount Wealth Management and Berchem, Moses & Devlin, P.C.

invite you to

“Get Active in Your Retirement—Take Control of Your Investment Portfolio and Estate Planning”

The only way to compete with an ever-changing market environment is to be active. Constant fluctuations in the stock market as well as continuous changes to tax laws and regulations have made the financial planning process quite challenging.

In this seminar, we will discuss the importance of active portfolio management and deliver key strategies on how to grow your portfolio in 2010. In addition, we will discuss the current state and federal estate tax laws and how they impact you. You will gain an overall strategy on how to be an active player in your overall financial health.

Speakers: **Louis Albanese, President**
Catamount Wealth Management
Shelby Wilson, Attorney
Berchem, Moses & Devlin, P.C.

Date: February 24, 2010
Time: 5:30-7:00 pm
Location: Westport Historical Society
25 Avery Place
Westport, CT 06880

Wine and Hors D'oeuvres will be served

Seating is limited, please register by contacting:
Sheila Ahern
(203) 226-0603 or sahern@catmg.com

www.catmg.com

