



## 2010 Firm Calendar of Events

All events are held in the Learning Center classroom located on the lower level of building "A" in the York Green complex located at [1300 York Road](#), Lutherville, Maryland 21093 unless otherwise stated.

### MARCH

2 Tue	10:00 AM	Annual Client Meeting™	All Family Legacy™ clients and their families, advisors & guests. Others may attend on a space-available basis. Reservations are required to allow us to properly prepare.
3 Wed	1:30 PM	Annual Client Meeting™	All Family Legacy™ clients and their families, advisors & guests. Others may attend on a space-available basis. Reservations are required to allow us to properly prepare.
4 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
6 Sat	10:00 AM	Annual Client Meeting™	All Family Legacy™ clients and their families, advisors & guests. Others may attend on a space-available basis. Reservations are required to allow us to properly prepare.
9 Tue	6:00 PM	Nuts-n-Bolts II™ Beneficiary Training	Beneficiaries of currently enrolled members of Family Legacy Legal Services should attend. Trusted advisors and clients are always welcome. Reservations are required to allow us to properly prepare.
23 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

### APRIL

8 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
9 Tue	6:00 PM	Nuts-n-Bolts I™ Trustee Training	Successor Trustees of currently enrolled members of Family Legacy Legal Services should attend. Trusted advisors and clients are always welcome. Reservations are required to allow us to properly prepare.
15 Thu	1:30 PM	Maximizing Your Retirement Plan Savings™	All are welcome to this introduction to integrating the tax deferral of a stretch-out with the personal protections available through estate planning. Reservations are required to allow us to properly prepare. CE – L/H & CFP
20 Thu	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

### MAY

3 Tue	6:00 PM	Annual Client Meeting™	All Family Legacy™ clients and their families, advisors & guests. Others may attend on a space-available basis. Reservations are required to allow us to properly prepare.
5 Wed	10:00 AM	Annual Client Meeting™	All Family Legacy™ clients and their families, advisors & guests. Others may attend on a space-available basis. Reservations are required to allow us to properly prepare.
6 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
13 Thu	6:00 PM	Nuts-n-Bolts II™ Beneficiary Training	Beneficiaries of currently enrolled members of Family Legacy Legal Services should attend. Trusted advisors and clients are always welcome. Reservations are required to allow us to properly prepare.
18 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

### JUNE

3 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
15 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

### JULY

1 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
20 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP



## AUGUST

5 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
24 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

## SEPTEMBER

2 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
11 Sat	10:00 AM	Client Update Program™	All EVEN YEAR Family Legacy™ clients and their families, advisors & guests. Reservations are required to allow us to properly prepare.
14 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
15 Wed	10:00 AM	Client Update Program™	All EVEN YEAR Family Legacy™ clients and their families, advisors & guests. Reservations are required to allow us to properly prepare.
16 Thu	1:30 PM	Client Update Program™	All EVEN YEAR Family Legacy™ clients and their families, advisors & guests. Reservations are required to allow us to properly prepare.

## OCTOBER

7 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
12 Tue	1:30 PM	Maximizing Your Retirement Plan Savings™	All are welcome to this introduction to integrating the tax deferral of a stretch-out with the personal protections available through estate planning. Reservations are required to allow us to properly prepare. CE – L/H & CFP
19 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

## NOVEMBER

4 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
16 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
27 Sat	12:00 Noon	Nuts-n-Bolts I™ Trustee Training	Successor Trustees of currently enrolled members of Family Legacy Legal Services should attend. Trusted advisors and clients are always welcome. Reservations are required to allow us to properly prepare.

## DECEMBER

2 Thu	6:00 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP
14 Tue	1:30 PM	The Truth About Estate Planning™	All are welcome to this introduction to planning that works. Reservations are required to allow us to properly prepare. CE – L/H & CFP

**Tell me and I'll forget; show me and I may remember; involve me and I'll understand.**

— Chinese proverb