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Pre-Retirement Seminar Series

26 & 27 FEBRUARY, 2015

Join our complimentary two-day seminar series at the **UN Secretariat Building** in New York. Speak with financial professionals and gain valuable advice to prepare for retirement.

VALID UN GROUNDS PASS NEEDED FOR ENTRY.

If you do not have a valid pass, please indicate that on the registration form(s) which must be completed by **18 February**. Click on the "Register" link next to each date below to access each form.

THURS, 26 FEB | CONFERENCE RM 8

- 8:30AM **U.S. Income Tax Issues Facing UN Retirees**
Speaker: Dale Mason, *The Wolf Group, P.C.*¹

- 10:00AM **Tax- Free Municipal Bonds²**
(For U.S. Citizens/Residents)
Speaker: Tom Schmitt, *Oppenheimer Funds*¹

- 11:30AM **Immigration: Permanent residency for G4 visa holders**
Speaker: Shari L. Moidel, Esq., *Immigration Attorney*¹

- 12:30PM **Investment Services for UNFCU members**
LUNCHEON*
Speaker: Stephen Ryerson, *UNFCU Financial Advisors*

- 2:30PM **International Estate Tax Planning**
Speaker: Jeff Slavet, *Citrin Cooperman*¹

FRI, 27 FEB | CONFERENCE RM 12

- 10:00AM **Financial Planning: Investing in Retirement**
Speakers: Sarah Komischke & Sal Frega, *UNFCU Investment Services, Raymond James Financial Services*

- 11:30AM **Computation and Taxation of the Lump Sum**
Speaker: *formerly with the UN Tax Unit*¹

- 12:30PM **U.S. Taxation for Nonresidents**
LUNCHEON*
Speaker: Marc J. Strohl, CPA, *Protax Consulting Services, Inc.*¹

- 2:30PM **Investing in Offshore Trusts (For Non-U.S. Residents)**
Speaker: Mark Kaplan, *Sanlam Global Solutions*¹

ALL SEMINARS WILL BE HELD AT

UN Secretariat Building
405 E 42nd Street, Lower Level
New York, NY 10017

26 FEB Seminars: Conference Room 8
27 FEB Seminars: Conference Room 12

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Passes will be made available near the information desk on the morning of the event.

* The luncheon will be held at **Delegates Dining Room**, 1 United Nations Plaza, New York, NY 10017.