

# FINANCIAL ROUNDTABLE

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CERTIFIED FINANCIAL PLANNER™

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CHARTERED RETIREMENT PLANNING COUNSELOR<sup>SM</sup>

*Attitude* is more important than the past,  
than education, than money, than circumstances,  
than what people do or say. It is more important  
than appearance, giftedness, or skill.

This is not a seminar

## ~MONEY~

We are all talking, thinking,  
hearing and worried about it.

**This is a place to come and get answers to  
financial questions.**

*We will always have a topic; however, this is your roundtable.  
Bring your questions. Meeting monthly.*

- What's up with the markets?!
- Convert or not convert - Roth IRA
- Should I rent or buy?
- Why do I need a trust?
- Will California go bankrupt?
- What happens to bonds when interest rates go up?
- When can I retire?
- Should my business have a SEP or a 401k?
- How will inflation impact my retirement?

**Where:** Lafayette Chamber of Commerce  
Conference Room  
100 Lafayette Circle, Suite 103  
Lafayette, CA 94549

**When:** Thursday, August 12th, 8:00 am to 9:00 am  
For Information, call 510-486-2494

Refreshments

