



DONNELLY COLLEGE



Donnelly College and the Office of Stewardship and Development thank you for your support by inviting you to this exciting workshop:

“Tax Reducing Strategies for Pre- and Post-Retirees”

Ask yourself these questions:

- Did you know you can sell highly appreciated assets and minimize Capital Gains taxes?
- Did you know you might be able to receive significant Tax Deductions today and possibly for another five years?
- Did you know you can protect your IRA from Double Taxation?
- Did you know you can maintain your income?

Learn Answers to these questions and much more by joining us on Wednesday, July 14th, 2021 at 11 A.M. at the renowned Donnelly College.



Wednesday, July 14th, 2021

10:30 a.m. – 11:00 a.m. – Social

11:00 a.m. – 12:00 p.m. – Presentation

12:05 p.m. – You are invited to stay for Mass in the Donnelly College Chapel

LOCATION

Donnelly College - Room 229

608 North 18th Street,

Kansas City, KS 66102

Register by emailing plannedgiving@archkck.org or call (913) 647-0365

Your Speaker



Bill Eckert is a well-known financial educator, speaker, and advisor in Kansas City. Bill has developed a specialty in teaching retirees and those about to retire how to help protect their principal and help ensure that their money lasts. Bill has directly assisted many investors to avoid the mistakes made by many pre and post retirees. Bill’s counsel has helped them maximize their incomes, reduce their taxes, and provide for their children and grandchildren. Bill has also shown people how they can truly make a philanthropic impact in the community today and in the future.

Bill is a Chartered Advisor in Philanthropy which provides him an in-depth knowledge of the entire philanthropic planning process including, but not limited to, estate and trust documents, taxation, accounting, insurance, and investments tools to help clients articulate and advance their highest aspirations for self, family, and society. Bill lives with his wife, Shanthi, who also volunteers with many charities. Bill and Shanthi have four children who live in Kansas City.

Bill is a registered representative and investment advisor representative of Securian Financial Service, Inc., Member FINRA/SIPC. Strategic Financial Partners - Kansas City is independently owned and operated. Strategic Financial Partners-Kansas City: 4000 W. 114th Street, Suite 180, Leawood, KS 66211 - Branch Office: 1755 Telstar Drive, Suite 501, Colorado Springs, CO 80920. Financial Advisors do not provide specific tax/legal advice and this information should not be considered as such. You should always consult your tax/legal advisor regarding your own specific tax/legal situation. Neither SFP-KC nor Securian Financial Services, Inc. are affiliated with Donnelly College of the Office of Stewardship and Development. 3580202 DOFU 05/2021

To reserve your seat call (913) 647-0365 or email plannedgiving@archkck.org