

**AUGUST SEMINAR:**

Reaching your Financial Goals through Advanced Planning

GUEST SPEAKER: Lan J. Shaw, CFP®

Financial Planner with Vision Financial Planning Inc

DATE: Thursday, August 23rd

TIME: 6:15pm - 8pm

Presentation Begins @ 6:30pm/ Doors Open @ 6:15pm

LOCATION: Lungomare

1 Broadway | Oakland, CA 94607

**AUGUST TOPIC**

**- Reaching your Financial Goals through Advanced Planning -
A Conversation with Lan J. Shaw**

Lan has developed a comprehensive and holistic formula for wealth management. Her approach includes:

- Wealth Management

- Investment Consulting
- Advanced Planning
- Relationship Management

JOIN THE CONVERSATION!

Our goal is to make the seminar as informative and interactive as possible. Please submit any questions that you have on our August topic and Lan and Endy will address them at the seminar. [Submit Your Questions](#).

COME EXPLORE AND LEARN FROM THE EXPERTS!

REGISTER NOW



Lan J. Shaw, CFP®

Financial Planner at Vision Financial Planning Inc

Lan has built her career by helping individuals, couples, independent women, and families pursue their dreams and make meaningful financial decisions that are true to their values.

Vision Financial Planning is her newest venture. Lan worked as a financial advisor at Edward Jones for nearly ten years prior to founding Vision Financial Planning in 2017. She can now offer even more transparency and options to you as a client to best meet your financial needs and goals. As always, she'll spend her time understanding what you are working towards before helping you to invest your money. Partnering with you, your CPA, attorney and other professionals, Lan takes a holistic approach to develop and implement thorough, thoughtful, and practical financial plans.

Lan's credentials include her undergraduate degree in systems engineering, an MBA earned in London, and her CERTIFIED FINANCIAL PLANNER™ certification. Lan's unique international background, broad business management experiences, and multilingual skills are invaluable to her clients, especially the entrepreneurs and multinational investors.

Lan believes in "giving back." Lan is generous contributor to the Children's Hospital Branches, Home of United String Ensembles, Berkeley Art Museum and Pacific Film Archive and UAspire. She is also an active member of the Berkeley Breakfast Club.

Lan is a compassionate, giving, hardworking professional who believes in treating clients like family. Born and raised in a harsh environment in China, Lan's parents inspired her uncompromising principles and work ethic. She believes authenticity, courage, commitment to family, generosity, lifelong learning, growth mind-set, and health are the keys to a successful life.

Lan loves spending time with family and friends. She enjoys entertaining, travel, cooking, biking, music, and dancing. Inspired by her son, Preston, Lan took cello lessons and has also become a Little League baseball umpire.

To learn more about Lan and her practice, please visit: www.visionfinancialplanning.com.

HOST



Endy Ukoha-Ajike - Tax and Estate Planning Attorney

Endy is an Oakland (Jack London Square) based Tax & Estate Planning Attorney with over 16 years of experience. He has helped countless families throughout California develop individualized estate plans and has administered many estates over that period. For more information about Endy, please visit: www.ukohalaw.com.

**WINE + APPETIZERS
FREE TO ATTEND
SPACE IS LIMITED**



LOCATION

Lungomare

1 Broadway

Oakland, CA 94607

@ Jack London Square

PARKING

Street Parking:

There is plenty of free 2 and 4 hour parking spots on the streets surrounding our office.

Garage Parking:

Jack London's Waterfront Parking Garage is conveniently located diagonally across from our office and above Yoshi's. Please note, we are not able to validate for the garage.

Rates: \$1.25 First Hour and \$1.25 Each Additional Half Hour.



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Lan Shaw (CA Insurance Lic# 0F94440) is a Registered Representative and an Investment Adviser Representative with/and offers securities and advisory services through Commonwealth Financial Network,[®] Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through CES Insurance Agency.

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