

JUNE SEMINAR

Protecting your Wealth from Healthcare Costs in Retirement
With Special Guest Lewis Phillips- Senior Financial Advisor

DATE: Thursday, June 23rd

TIME: 6pm - 8pm

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

LOCATION: Lungomare



JUNE TOPIC

Protecting your Wealth from Healthcare Costs in Retirement

LEARN FROM THE EXPERTS!

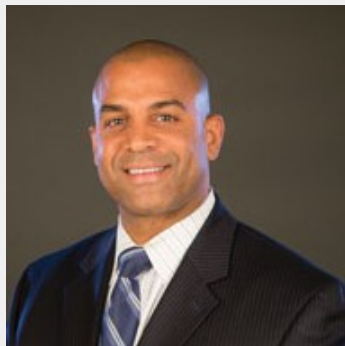
When polled about their life priorities, 72% of retirees and pre-retirees said health problems are their #1 concern (Merrill Lynch/Age Wave study).

GUEST SPEAKER:

We are excited to announce that Lewis Phillips- Senior Financial Advisor at Merrill Lynch Wealth Management, will be joining Endy as our Guest Speaker this month.

Join Endy and Lewis as they discuss:

- How rising healthcare costs affect your assets when you retire
- Medi-Cal Estate recovery from CA Department of Healthcare Services



Lewis Phillips- Senior Financial Advisor at Merrill Lynch Wealth Management

Lewis has been in the financial services industry since 1996 and joined Merrill Lynch in 2013. His focus is on developing strategies and solutions for high-net worth individuals, their families and their business to help them meet their short and long-term financial goals. Lewis's approach to wealth management is consultative, objective and committed to excellence in service and value based solutions.

Lewis is a graduate of Hiram College and holds a B.S. Business Management. He and his wife, Michelle live in Alameda.



Endy Ukoha-Ajike- Tax and Estate Planning Attorney

Endy is an Oakland (Jack London Square) based Tax & Estate Planning Attorney with over 13 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.

JOIN THE CONVERSATION!

Our goal is to make the seminar as informative and interactive as possible so please submit any questions that you have on this month's topic and Endy and Lewis will address them at the seminar. [**Click Here to Submit Questions.**](#)

LOCATION:

Lungomare (Private Dining Room)

Jack London Square

1 Broadway

Oakland, CA 94607

**WINE + APPETIZERS
FREE TO ATTEND
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