

Beacon Wealth Management to Host Breakfast and Roundtable Discussion on  
Tax Reform for Florida Residents and Business Owners

*“Tax Reform in the Age of the Longevity Economy” will take place in Palm Beach Gardens, Florida on Thursday, November 29 at 9:00 a.m.*

**November 6, 2018 (PALM BEACH GARDENS, Fla.)** – [Beacon Wealth Management](#) (Beacon), an independent, fee-based wealth management firm based in Hackensack, N.J., will bring its signature Tax Reform Roundtable to members of the Palm Beach Gardens, Florida community during a breakfast discussion on **Thursday, November 29 at 9:00 a.m.** Registration is now open.

Founder and CEO of Beacon, **Mark Germain, CFP®, MBA, ADPA®** and partner, **Christopher Cacchiola, CPWA®, CIMA®, CRPC®** will lead a discussion with independent taxpayers and local business owners titled “Tax Reform in the Age of the Longevity Economy.” The roundtable-style discussion will explore how retirees and near-retirees must plan, save and structure their finances as the country faces tax reform and a shifting economy impacted by increased age longevity. Topics will focus on tax planning and wealth strategies for individual and married taxpayers, as well as guidance on pass-through entities such as LLCs, sole proprietorships, partnerships and S-corporations.

Details for the event are as follows:

- **Date:** Thursday, November 29, 2018
- **Time:** 9:00 a.m. – 11:00 a.m. EST
- **Location:** Beacon Wealth Management at Intelligent Office, 4440 PGA Boulevard #600, Palm Beach Gardens, FL 33410
- **RSVP:** To register, please email Karla Castillo at [karla@bwmlc.com](mailto:karla@bwmlc.com) or call (201) 447-9500. Please be aware that space is limited.

“Advancements in technology and scientific research have dramatically increased life expectancy rates in the U.S.,” said Germain. “While this newfound longevity economy is reason to celebrate, it’s also reason to reconsider our wealth management strategies - particularly tax planning - to ensure we do not run the risk of negatively impacting our long-term financial goals. We are excited to join residents of Palm Beach Gardens and surrounding communities for a morning of engaging discussion, financial guidance and relationship building. We also look forward to introducing new members of Beacon’s Florida-based advisory team.”

Beacon’s Tax Reform Breakfast Roundtable is a national event series that educates individuals across local communities about timely tax strategies to keep long-term financial goals on track. For more information about Beacon, visit <https://bwmlc.com>. For questions about the event or to register, email Karla Castillo at [karla@bwmlc.com](mailto:karla@bwmlc.com) or call (201) 447-9500.

#### **About Beacon Wealth Management**

Beacon Wealth Management, LLC is an independent, fee-based Registered Investment Advisor (RIA) firm based in Hackensack, New Jersey. The firm offers investment management and financial planning to individuals, entrepreneurs and the medical community. For more information please visit <https://bwmlc.com> or follow Beacon on [Facebook](#), [LinkedIn](#), [Twitter](#) and [Instagram](#).

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