

ABOUT THE
LAKESIDE CHAUTAUQUA
FOUNDATION

The Lakeside Chautauqua Foundation (LCF) is a not-for-profit subsidiary of the Lakeside Association. LCF manages the long-term endowment funds and annuity accounts, oversees the Lakeside Fund and cultivates major gifts, providing oversight and accountability for funds raised, funds distributed and results achieved.

LCF is responsible for raising and growing charitable giving to support the Lakeside Association in accordance with Lakeside's mission.

LAKESIDE CHAUTAUQUA
FOUNDATION

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FINANCIAL PLANNING
+ GENEROSITY

MADE POSSIBLE BY KEY PRIVATE BANK

Key Private Bank



Presented by the
LAKESIDE CHAUTAUQUA FOUNDATION

FINANCIAL PLANNING + GENEROSITY



In this 3:30 pm Monday seminar series, the Lakeside Chautauqua Foundation will host an array of legal and financial professionals to discuss different financial and estate planning strategies and how generosity can fit into your financial plan.

You will learn new tips and strategies that help you make the right decisions with your money so you can accomplish your financial goals.

Topics include:

- budgeting ideas
- investment strategies
- retirement planning
- estate planning



Financial Planning + Generosity made possible by Key Private Bank

June 20 *Making Retirement Income Last a Lifetime with Angela Granata, Certified Financial Planner*

June 27 *Investing in a Low Interest Rate Environment with Jason Adams, Certified Financial Planner, Protecting Your Returns in an Increasing Tax Rate Environment with Brian Jaros, Certified Financial Planner and Preserving Your Assets in a Changing Estate Tax Environment with Angela Griffith, J.D.*

July 4 No Seminar Offered

July 11 *Economic Update with Bruce McCain, Chief Economic Strategist for Key Private Bank*

July 18 *“Going Green” Environmental Stewardship with Angela Granata, Certified Financial Planner*

July 25 *Business Succession Planning with Kent Burrow*

Aug 1 *Social Security Updates with Chuck Grimm, Financial Planner*

Aug 8 *Estate Planning with David Barrone, J.D., Estate Planning Wealth Specialist*

Aug 15 *Estate Planning with Stacey Brancheau, J.D.*

Aug 22 *The Rev. David S. Bell, Director of the West Michigan United Methodist Foundation; President of the Board of Directors of the Ecumenical Stewardship.*

Aug 29 *Economic Update with Angela Granata and KeyBank Team*



*The seminars will take place in the Fountain Inn at 3:30 p.m. on Mondays.
For a more detailed listing of the seminar series please visit www.lakesideohio.com/giving.*