

Dear Clients and Friends:

With Labor Day behind us, we are ready to resume our educational workshop program. This fall, the focal point of our program will be the forthcoming changes in the tax laws. While no one truly knows what the tax law will look like in 2011 and beyond, the consensus is that those who have accumulated wealth and earn higher incomes will have to plan on an increased tax burden. This tax burden will impact your investment planning and estate planning.

Our workshop series is “A Taxing Future: Plan Today for an Uncertain Tomorrow” and the events will be held in our Scottsdale and Chandler offices, as well as in Urke & Stoller’s Phoenix office location. The workshop will address new income and estate tax provisions, both laws in place and what has been proposed for 2011 and beyond. Along with Urke &

Stoller, we will be discussing the issues to look out for as well as planning steps to consider.

But your financial security is only one aspect of your well-being... So, we’ve also collaborated with our friends at **Mayo Clinic** to assemble a series of events that will enhance your understanding of key health issues that you and your loved ones will want to have a good handle on as you work to secure a healthy future.

We are pleased to announce the series of fall events that will focus on health care issues that the doctors at Mayo Clinic have identified to be the most relevant areas of concern for those in retirement and planning for retirement. The events will focus on a specific disease and the related issues to consider with each.

A TAXING FUTURE:*Plan Today for an Uncertain Tomorrow Workshops*

Monday, November 8 at 6:00 PM Scottsdale • **Tuesday, November 9** at 10:00 AM Scottsdale
Tuesday, November 9 at 6:00 PM Phoenix • **Wednesday, November 10** at 10:00 AM Chandler
Tuesday, November 16 at 10:00 AM Scottsdale • **Tuesday, November 16** at 6:00 PM Phoenix
Thursday, November 18 at 10:00 AM Chandler • **Thursday, November 18** at 6:00 PM Scottsdale

YOUR HEALTH WITH MAYO CLINIC:*Before and After Retirement***EVENT 1:****Focus on Prostate Cancer -**

Our two discussions will be held on
 Wednesday, September 29th
 at 6:00 PM in our Scottsdale office
 and the next morning on
 Thursday, September 30th
 at 10:30 AM in our Chandler office.

EVENT 2:**Focus on
Breast Cancer -**

The specific date of this
 one night only event in
 October has yet to be
 determined; details will
 be forthcoming.

EVENT 3:**Focus on Screening
for Coronary
Artery Disease -**

The specific date of this
 event in November has
 yet to be determined;
 details will be forthcoming.

EVENT 4:**Focus on
Dementia &
Alzheimers -**

The specific date of this
 event in November has
 yet to be determined;
 details will be forthcoming.

Please note: We anticipate our workshop events to fill up quickly. Please contact your WealthTrust advisor or me, Paul Ahern, at our office to RSVP for any of the events by calling 480-483-7300. You can also email me at pahern@wealthtrust.com. As always, please feel free to invite any friends or family members who you believe would benefit from the educational information addressed in our wealth and wellness series.

We look forward to seeing you soon! As always, please contact us anytime with questions you might have.

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