CalCPA 2021 MEETING SCHEDULE

JAN 19	PROP. 19	Cameron Hess
FEB 16	ESTATE PLANNING FOR THE HIGH NET WORTH CLIENT	Richard Rojeck
MAR 16	TAX COLLECTION PRACTICE AND PROCEDURES	Joseph A. Broyles, Esq., CPA and William Holmes
APR 20	WHY IS THERE NO FINANCIAL LITERACY EDUCATION IN CA?	Fred Jones and Larry Pon
MAY 18	THE RETIREE'S INVESTMENT PORTFOLIO : SHOULD THERE BE A DIFFERENCE?	Mitch Freedman
JUNE 15	LONG TERM CARE PLANNING	Brian Gordon
JULY 20	RETROACTIVE ERISA PLANS HOW TO GET 2020 TAX DEDUCTIONS	Leonard C. Wright, CPA/PFS, CFP®, ChFC®, CLU®
AUG 17	CROSSOVER ISSUES IN ESTATE PLANNING AND MARITAL DISSOLUTION	Kirsten Howe
SEPT 21	FIXED INCOME WHERE TO FIND VALUE IN TODAY'S FIXED INCOME MARKET	Julie Mandell / Julio Bonilla Schroders Investment Mgmt.
OCT 19	PANEL DISCUSSION 'ASK a PFS' - OUR 'ABC' PANEL	Mark **A**strinos, Jean-Luc **B**ourdon, Gina **C**hironis
NOV 16	BRIDGING THE GAP BETWEEN FINANCIAL SERVICES & LOW-WEALTH COMMUNITIES	Saundra Davis Sage Financial Solutions
DEC 14	RECAP OF THE MARKET	Brian Levitt Invesco

12:00 PM - 1:00 PM

VIRTUAL MEETING
VIA **ZOOM**, link will be provided

QUESTIONS? / RSVP

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3rd TUESDAY of ea. MONTH