



Financial Planning Seminar



at St. Rose Church

Not everyone is subject to estate taxes these days. But everyone still needs an estate **plan**. Mistakes in planning can be very costly (not only in dollars and cents), but in relationships, too. More arguments among families occur due to “not having an estate plan” than nearly any other topic.

The Church of St. Rose will be hosting an educational seminar on Tuesday, November 13th on Financial Planning, Estate Planning and how to properly make planned gifts to family members and charity.

The seminar will be conducted by Thomas Mullooly, CEO of Mullooly Asset Management, Inc. Many of you know Tom as a Parishioner and Trustee at St. Rose. Tom is also a member of the Finance Council for the Diocese of Trenton. Tom and his three sons work with individuals on their investment, retirement and estate plans. Mullooly Asset Management is a fee-only registered investment advisory firm. Their office is located on Route 35 in Wall Township.

With more than thirty years of experience working with families on their investment, retirement and estate plans, Tom would like to share some important points you should know regarding how to properly leave gifts and planning a proper estate. There will be no selling of investment products or services. This is a purely educational seminar. The seminar will be held twice on Tuesday, November 13th in the Parish Center: once at 2 pm and again at 7 pm. Please contact the parish office at 732-681-0512 to reserve your seat.

Mullooly
ASSET MANAGEMENT, INC.



"It's not luck . . . it's planning!"



