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Featured speakers:

Colleen M. Carcone, CFP®
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

James M. Alverson, CFP®
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

As Directors of Wealth Planning Strategies for TIAA, both Colleen and James provide comprehensive wealth transfer, estate and tax planning considerations for clients with the most complex needs. Their tax and estate planning knowledge and background allow them to provide high-net-worth families with specialized advice and sophisticated planning strategies for every aspect of their financial lives.

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