

Layton City Small Business Seminar



Contact Morgan Cloward
to sign up today!
mcloward@laytoncity.org

November 5, 12:00-1:00 pm

Layton City Center [lower level]
437 N Wasatch Drive, Layton, UT

Sponsored by: First Community Bank
and Layton City

Take Control of Your Future: Master Estate Planning, Social Security, and Taxes

As a small business owner, your business takes up most of your focus, but securing your personal financial future requires dedicated strategy. Join us for **Organize Your Retirement**, a hands-on workshop tailored specifically to help local business owners navigate the key financial decisions that shape a confident future. We will cover practical, actionable strategies surrounding Family Trusts, Social Security optimization, managing investment risk, Roth conversions, and tax-efficient wealth transfers. Learn how to connect these critical financial models into a cohesive estate and retirement plan designed to protect your hard-earned legacy.



Ron R. Valentine –
Owner, Valentine CPA



Rob Simons – Registered
Investment Advisor,
Valentine CPA

Free Class
Free Lunch



Layton City Economic Development: 801-336-3770