

**The Plentai-Lewis Group**



*Cordially invites you to attend a special presentation*

**Strategies for Tax-Efficient Wealth Management**

*Professional  
Development  
Credits  
Available!!*

- Tax-deferred investing for businesses
- Converting interest income into capital gains
- Optimizing the capital dividend account and “eligible” dividends for tax-efficient family income planning
- Designed to ensure that investment objectives are in tune with intergenerational planning (like the capital gains exemption) and with the recent expansion of opportunities for professionals to incorporate

*Presented by:*

**John Stacey, FCA**  
**Director of Taxation**

**NexGen Financial Limited Partnership**

---

**Date:** **Wednesday, June 11<sup>th</sup>, 2008**

**Time:** **4:45 pm – 6:00 pm**

**Location:** **Four Points by Sheraton**  
**3530 Schmon Parkway**  
**Thorold, ON L2V 4Y6**

**RSVP:** Gail Belchior at (905) 980-6332 *or* via email at [gbelchior@wellwest.ca](mailto:gbelchior@wellwest.ca)

---

*Paid for in part by:*

