



Taking Care of Business for 60 Years.

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FOR IMMEDIATE RELEASE

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Michael Morris to Address Estate Planning at June 19 Business Symposium

SHELL BEACH – Michael Morris, senior principal with the Andre, Morris & Buttery law firm of San Luis Obispo, will join a panel of business leaders June 19 for the Summer Professional Education Series sponsored by Joe Brittingham, CFP® of Edward Jones Investments.

The free event will take place 8 a.m. to 1 p.m. at the Dolphin Bay Resort and is geared for CPAs, enrolled agents, attorneys and other qualified professionals. The program is approved for two hours of continued professional education (CPE) credit for CPA's and enrolled agents. Breakfast and lunch at Lido's Restaurant are included.

Morris, who has more than 35 years experience in real estate, business counseling, and estate and trust matters, will give an update on recently enacted estate planning legislation and currently proposed legislation.

Other speakers will include financial advisor Joe Brittingham, CFP® of Edward Jones Investments; retirement and wealth consultant Karen Hofmann, The Hartford Funds; and Jeff Vollmer, vice president, Franklin Templeton Investments. They will address investment outlook and opportunities, professional ethics and charitable giving.

Space is limited. Contact Brittingham, (805) 473-9200 or Joe.Brittingham@edwardjones.com to enroll.