



How to...

Summer Seminar Series



Join Charlotte State Bank & Trust Vice President **Christine Hause**, left, and Portfolio Manager **Angie Parsons** for a series of estate-planning and investment seminars designed to help attendees learn “how to” ensure and protect their financial legacy. The complimentary seminars are being held from 10 a.m. to noon. at the bank’s North Port office, 4300 Aidan Lane; Murdock office, 1100 Tamiami Trail, Port Charlotte; and Punta Gorda office, 2331 Tamiami Trail. The seminars at the Murdock office will also be presented via webinar.

...Create a Last Will and Testament or Trust and Identify and Lower Investment Expenses
Monday, July 11 at North Port | Monday, July 18 at Murdock* | Monday, July 25 at Punta Gorda

...Select a Successor Trustee and Agent and Decide the Best Stock-to-Bond Ratio for You
Tuesday, July 12 at North Port | Tuesday, July 19 at Murdock* | Tuesday, July 26 at Punta Gorda

...Fund Your Will or Trust with Proper Titles and Beneficiaries and Maximize Bond Income with Low Risk
Wednesday, July 13 at North Port | Wednesday, July 20 at Murdock* | Wednesday, July 27 at Punta Gorda

...How to Benefit from Florida Residency and Get Stock Market-like Returns Consistently
Thursday, July 14 at North Port | Thursday, July 21 at Murdock* | Thursday, July 28 at Punta Gorda

...Minimize Estate Planning Stress on Family and Handle Out of State Wills, Trusts and POAs
Friday, July 15 at North Port | Friday, July 22 at Murdock* | Friday, July 29 at Punta Gorda

Registration is available at any Charlotte State Bank & Trust branch office, online at www.charlottestatebank.com, or by calling Trust Operations Specialist Linda Ferrara at 941-624-1943.

*Participants may attend via webinar.



Investments are not a deposit or other obligation of, or guaranteed by, the bank, are not FDIC insured, not insured by any federal government agency, and are subject to investment risks, including possible loss of principal.