INVESTMENT, ESTATE, AND TAX PLANNING (206)

Tuesdays, 2:00 – 4:00 (3 Classes, 2/17 – 3/3) in Room 19 **Tuition $37**
ATTENTION: $5 tuition fee for the first 20 students who register for this three-week course. To promote financial literacy, this course is being subsidized by *Baird Private Wealth Management*.

- **Overview of Investments and Markets**: Learn the basics of the capital markets and forces that cause stocks and bonds to fluctuate. Understand how the Fed, the markets, and the economy interact.
- **Taxes, Estates, Probate and Trusts**: Simplify life for your survivors. Plan for the efficient transfer of assets during your life and at death. Understand wills, trusts, and steps to reduce your tax liability.
- **Evaluating Special Situations**: Retirement plans; Taxable versus Tax Free Investments; managing your portfolio rationally.
- **Investment Strategies**: Updating your investment portfolio and understanding the markets in today's volatile economy.

(*Informational purposes only. Contact your Tax Advisor/Estate Planner for more information.)*

Rudy Fernandez, CFP® has practiced in the financial services industry since 1982. Rudy works with businesses and individuals, guiding them to achieve their financial objectives. His years of experience have given him a depth of knowledge--particularly in the field of Retirement Planning. Rudy earned his degree in Accounting at the University of Notre Dame. Since 1987, he has taught courses dealing with current financial and economic issues at Hillsborough Community College, at USF Osher Lifelong Learning Institute, and at Center 4Life Learning. A highly active member of the Tampa Bay community, Rudy was elected to the Tampa City Council in 1991. During his time as a council member, he served as Finance Chairman for eight years. Rudy has also served on many other civic boards throughout the area. Rudy is known for his clear, concise way of communicating complicated topics in an understandable manner. Rudy was recently recognized by Shook Research as a 2024 and 2025 FORBES Best-In-State Wealth Advisors. 2025 recognition published on 4/8/25. Rankings based on data as of 6/30/24.