

Business Networking Group Minutes

March 14, 2008

Facilitator: Triona Guidry

Business introductions /Announcements

- Lake Zurich Home Home Expo show at Lake Zurich High School
- Facilitator sign up sheet distributed- opening April 25th- Please sign up
- Taste of BNG—date set for August 17th- at Old School Forest preserve Shelter E, more info to follow and will be looking for help.
- Ron Campbell's mother passed away- our deepest condolences.

Raymon Alperstein and Robert Goodman- Reduce Taxes-IRA's etc

Robert and Raymon gave presentation discussing various products to reduce taxes and prepare for retirement.

- What kind of lifestyle? How much money will that take ?
- IRA 2008 if under 50 years old can contribute up to \$5,000, if over 50 \$6,000
 - Continually review your beneficiaries
- Roth IRA - grows tax deferred, not tax exempt contributions, can be passed on to beneficiary
- Business- have available products – 401k, SEP, Simple IRA
- If questions, see Robert or Raymon or your financial planner

In Attendance:

Joel Nelson
Bill Wysow
Holly Monger
Triona Guidry

Doug Howard
Alan Winter
Phil Monger-guest
Julian Cohn

Raymon Alperstein
Gordon Nishimoto
Bob Goodman
Rhea Kleebblatt

Steve Kessler
John Koelig
Steve Mongelluzzo