

PERSONAL & CYBER SECURITY EVENT (OCTOBER 2017)

After the Equifax breach that effected so many of us earlier this year, we felt it necessary to look for an expert that could advise us all on best practices regarding personal and cyber security. We coordinated our efforts with our corporate partner Fidelity to host this event, with guest speaker Gary Rossi. Gary is the former FBI chief of undercover and sensitive operations and the current head of corporate investigations at Fidelity.

This event was held at the Newton Marriott in October of 2017 and covered some great tools for us all to follow to help ease the potential of identity theft and security breaches.

We want to thank all our clients, prospects and professional partners for attending and for providing great feedback on ideas for future events. In addition, we want to thank our sponsor Fidelity for providing such a useful learning experience.

We look forward to seeing you all at our next event.



MEDICARE & SOCIAL SECURITY EVENT (JUNE 2017)

We held this event to help guide our clients, prospects and professional relationships, on the topics of Medicare and Social Security, this past June at the Indigo Hotel in Newton, MA.

BlackRock, one of our partners, was the sponsor for the event and provided the speaker for the evening, who covered the most commonly asked questions relating to the two topics. We also provided knowledge on what to do and not to do, when filing for either service, loopholes and other areas to be aware of.

We concluded the evening with a wonderful wine tasting, sponsored by Vino di vino, along with some amazing hors d'oeuvres from Indigo Hotel. We were blessed with a beautiful day and night and the opportunity to learn and try some new and rare wine options.

As always, we thank everyone who attended, our sponsors and team members and look forward to our next outing.

