



Family Gifting Strategies and the Tax Sunset

The Sunway Team at Morgan Stanley

Join us on **April 12th, 2024** at 12:00 for a webinar on family gifting.

Vanguard’s Financial Planning Coach & Strategist, Julia Fuentes, will present a new client-focused presentation focused on gifting strategies, estate taxes, and the upcoming tax sunset.

Please feel free to share with anyone that may be interested.

Julia will be available before and after the event to answer any specific questions.

DATE

Friday, April 12, 2024, 12:00 p.m. EST

LOCATION

Virtual

[Register Here](#)

Featured Speaker: Julia Fuentes

Julia Fuentes, CIMA®, WMS , currently serves as Vanguard's financial planning & coaching strategist, responsible for growing and enhancing financial planning offers designed to support Vanguard's financial advisor partners. Since joining Vanguard in 2008, Mrs. Fuentes has assisted financial advisors with their investment strategy, practice management, and sales needs. She has also offered investment solutions and portfolio construction guidance for financial advisors while managing Vanguard ETF® Strategic Model Portfolio service.



Julia Fuentes
Financial Planning & Coaching Strategist
Financial Advisor Services

Prior to Vanguard, Mrs. Fuentes was a financial specialist with Wachovia Securities and a credit manager at Wells Fargo Financial. She earned her B.S.in finance and marketing from Bloomsburg University.

[Signature of Primary Contact]

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