

REAL ESTATE INVESTMENT AND ASSET ALLOCATION & PROTECTION STRATEGY

Mr. Alan Chew:

- The basics of asset protection, and timeliness of an effective plans for asset protection
- Types of risks in asset accumulation and preservation and practical risk aversion strategies available
- How to incorporate Asset Protection planning in estate and retirement planning
- The basics of trust, principles and key considerations as establishing a trust

Ms. Jing Wang:

- Six key areas of capital accumulation and protection
- Family Legacy maximization and Taxation minimization
- Tax diversifying retirement income with cash value life insurance

Mr. Yifei Wang

- The basics of Greater Boston real estate investment, and future market insights
- Comparison of various types of real estate and corresponding investor groups
- Asset protection and risk aversion regarding real estate investment

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MDRT* TOT memeber (Top of table)
2018 New York Life Chairman® Council member
2017 New York Life Boston General Office Agent of the year



Yifei Wang

Top 10 Real Estate Agent of Boston Metro West
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