

Charter Financial Resources April Upcoming Events

at Memory Lane



9335 Commerce Center St Unit B5
Highlands Ranch CO 80129

Call (720) 473-5483 or Reply To This Email to RSVP

2017 Shred Event:

Join us for Charter Financial Resources' 7th straight FREE annual document shredding event. Limit 5 boxes of documents per family. On **Saturday April 22nd from 11:30 AM - 12:30 PM** we will have a mobile shredding truck on site at 9335 Commerce Center St Unit B5 Highlands Ranch 80129.

Deferred Sales Trust:

If you or someone you know has highly appreciated assets like rental real-estate, art or a business; the Deferred Sales Trust strategy uses the installment sale provision of the IRS tax code to liquidate an asset now while deferring the capital gain tax over a period of time. Invite your CPA, Attorney, Realtor or any other person you think could benefit from learning about this strategy. **Thursday April 27th from 6:30 pm - 7:30 PM**

Building Toy Cars for Charity:

Become a "Smile Maker" at our next service opportunity with *Toys for Gods Kids* **Saturday April 29th from 11:30 am - 1:30 pm** we will help assemble 1,000 toy cars to be handed out in 3rd world countries by troops and missionaries. We missed doing this last month so hopefully we can build enough to catch up. PLEASE RSVP! We've had more guests come than expected previously. We just need to have enough stations set up. Everyone is welcome so bring kids and grand-kids to help. [CLICK HERE](#) to see their website and the good they are doing.

April Birthday Open House:

Celebrate your birthday at Memory Lane! Once a month, we invite you to bring your friends and/or adult children for an informal good time. Food and dessert will be served. **Wednesday April 19th from 6:00 - 8:00 PM.**

Active Minds:

On the fourth Monday of every month, we host the Active Minds® seminar. This month, our speaker will be discussing the history of immigration in the U.S. and how this issue is currently playing out at both the federal and state level. They will discuss the economics and politics of various aspects of U.S. immigration policy and how these elements are viewed by various constituencies within the U.S. **Monday April 24th from 6:00 - 8:00 PM** Dessert/Refreshments will be served. Learn more at www.activeminds.com.

Lunch 'N' Learn Seminar:

Each month, we provide several opportunities for clients to come and explore the latest in Long Term Care over a light meal. The focus this month:

- LTC Strategies without LTC Insurance
- Don't Go Broke in a Nursing Home
- New Laws - New Strategies - New Solutions

We'll meet three times this month:

Monday April 15th 10:00 AM - 12:00 PM Lunch

Wednesday April 26th 6:00 PM - 8:00 PM Dinner

Saturday April 29th 10:00 AM - 12:00 PM Lunch

We hope to see you at any or all of these events!

[Marc Wheeler](#)

Vice President

Registered Representative

Charter Financial Resources, LLC.

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Highlands Ranch, CO 80129

(720) 344-5386

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