

PROFESSIONAL TAX &

Planned Giving Seminar



Social Security: Facing Reality in 2025

June 24, 2025 | 7:30am

Presented by **William F. Rainaldi CFP AEP**

Senior Financial Services Consultant,
Security Mutual Life Insurance Company
of Binghamton, NY

Irondequoit Country Club

4045 East Avenue | Rochester, NY

7:30am Registration

8:00am Program

10:00am Conclusion

William Rainaldi is a Senior Financial Services Consultant for Security Mutual Life Insurance Company of Binghamton, NY. He is a leading authority on U.S. Social Security and its impact on retirement planning. He previously served as The Kugler Company's CEO for over 20 years. He also has an extensive background in life insurance, business and investment concepts and computer technology.



No charge to attend. Program will be offered in-person only and will be available on a first-come, first-served basis.

CE/CLE Credits

This program will include two continuing education credits for all professionals. Details will be provided on the day of the seminar.

For questions, contact Eric Brandt at 585.241.8625
or ebrandt@jewishrochester.org.

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