



MICHAEL G. STANIS, CFA, CFP®
Senior Portfolio Manager, Principal, Johnson Investment Counsel
Treasurer, Cincinnati P&G Alumni Network

LEARN ABOUT YOUR P&G PROFIT SHARING TRUST OPTIONS

THREE SESSIONS AVAILABLE:

DECEMBER 2ND | JANUARY 13TH | FEBRUARY 23RD

Are you, a family member, friend, or neighbor a current or former Procter & Gamble employee? This workshop is designed to help simplify the process of decision-making for owners of the P&G Profit Sharing Trust (PST). There are several options for how the proceeds may be distributed, invested, and how taxes are impacted.

JIC Senior Portfolio Manager Michael G. Stanis, CFA, CFP®, is uniquely qualified to guide families through this process. Mike spent over 17 years with P&G and held ten different assignments in Finance and Brand Management. He wants to share what he has learned about transitioning from P&G so that you can make the best decisions for your family.

This workshop will:

- > Explore the PST distribution options
- > Walk through examples including the special lump sum tax treatment
- > Provide insight about potential obstacles and help your family see around corners

Join us for a Virtual Workshop “P&G Profit Sharing Trust Options”

Three session times are available to suit your schedule:

- » December 2, 2020, 4-5 pm OR
- » January 13, 2021, 4-5 pm OR
- » February 23, 2021, 12-1 pm

All Workshops Via Zoom 

RSVP TO RECEIVE THE MEETING LINK

Email: mstanis@johnsoninv.com
Direct: (513) 389-2759

There is no cost to attend. Feel free to invite guests. Please ask all guests to RSVP so that the meeting link can be sent to them.