



Attorneys at Law

I just received an invitation to a free dinner at a very good steak house. I do not know what is going to be served at the steak house. It has been many years since I have dined at the steak house but my memory was the food was excellent, plentiful and expensive.

Once I received this free invitation, I wondered why I received the invitation to the "special dinner event." The caption said, "Do you want a tax free retirement"? I thought. ' who doesn't?' The invitation states that "there is NO cost or obligation for attending." The workshop is sponsored by someone in the financial industry. At the very bottom of the invitation, in small print it states: "Note: This event is for consumers only. Financial advisors, attorneys, CPAs, financial representatives, or insurance agents are not invited or will be charged a \$1,500 per person educational learning fee."

I do not know what will be discussed or if there will be a high pressure sale. I would encourage you that over the years in handling fraud cases, many start with a similar invitation. Please be careful about attending any event that does not allow you to bring representation, such as an attorney, someone with expertise, such as a CPA, or someone you may trust like your own personal financial advisor. As they say, there is no free meal.
