



Warren S. Johnson Society Newsletter  
WSJSociety.com  
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**Summer 2022 Luncheon**  
**Thursday, July 21, 2022**

Alioto's-3041 N. Mayfair Road

**PRICE: \$19 per person**

11am-Gathering / 12pm-Lunch / 1:00 program

The luncheon selections are:

- Beef tenderloin tips with noodles
- Lemon caper chicken with pasta
- Grilled Chicken Caesar Salad

Each meal comes with:

- Salad with choice of dressing, or soup, or fruit cup (depending on lunch choice)
- Whipped or buttered potatoes
- Italian bread
- Coffee, tea, milk
- Chocolate sundae for dessert

Lunch is \$19 per person.

Please make checks payable to: WSJ Society.

**Checks need to arrive by July 14, 2022**

Mail checks to:

WSJ Society  
P.O. Box 1425  
Grafton, WI. 53024

Please let us know of any dietary restrictions you may have when making your reservations.

Or, contact Jim Pasterczyk, VP Program, at 414-764-8609.

Program Speakers

Andrew B. Mortenson and Peter Go  
Mortenson Go Financial Consultants  
Great Lakes Advisor Group  
Thrivent Financial

Andrew and Peter will speak about the current financial market, tax strategies, and planning for future healthcare costs.

They will discuss various tax issues including:

- your tax bracket, before and after age 72.
- how different investments are taxed.
- minimizing lifetime taxes and estate strategies
- multi-generational planning

They will also talk about charitable giving strategies.