



## The Rundown

December 2, 2015

### **“Investment & Retirement Planning”**

Presented by Alan Bergamini, Berlin, Ramos & Co.

Written by Vincent DiCarlo, YPN Member

The [Young Professional’s Network](#) of the [Greater Silver Spring Chamber of Commerce](#) held their November 2015 event at the wonderful offices of [Berlin, Ramos & Company](#). This month’s event surrounded the topic of [Investment & Retirement Planning](#) that also included a lovely happy hour and appetizers provided by [The Daily Dish](#) (my personal favorite, the Pumpkin Soup Shooters). The key note speaker was [Alan Bergamini](#), CPA, CFP, and Tax Partner at the firm.

As each attendee arrived to receive their name tag, they were given a short multiple choice quiz to test their existing [“Financial Planning IQ.”](#) Most of us looked at the quiz as if it were a foreign language, only finding comfort in an adult beverage. After some [networking](#), everyone found their seats around the board room table where Alan grabbed everyone’s attention and began his presentation.

Alan created an [open dialog conversation](#) for the attendees by first reviewing the 11 question quiz that was handed out. As he read out each question, attendees were given the opportunity to share their answer, and if correct, win a prize. Anything from water bottles to wine bottle holders were graciously handed out. To the surprise of many, the young professionals seemed [much more knowledgeable](#) about financial planning than they thought. The succeeding time was used to soak in as much information as possible, ask specific questions to Alan and peers, and to start brainstorming and implementing a [personal financial plan](#).

It was great to see the room [discussing plans](#) that they could start working on and bouncing ideas off one another. Alan made it clear how each question related to young people and how it can [directly affect their wealth](#) moving forward. After Alan concluded his presentation we all thanked him for his time and generosity in showing us [the importance of proper financial planning](#). Networking continued as people finished the remaining appetizers. By the end of the event we were all full of food and knowledge. Financial planning can be intimidating for yps, so we are truly grateful for [Alan’s excellent presentation](#) and the hospitality of [Berlin, Ramos, & Co.](#)



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