

TESTIMONIALS

EMPLOYEE GROUPS

...Your discussion makes use of common sense approaches to managing our retirement funds, which hopefully will allow normal everyday people to survive any US economic fallout from the election...

Bob Clark - APS/Pinnacle West Retirees' Association

RETIRED GROUPS

...You are such a dynamic speaker; it was a pleasure to listen to you...

Wanda Bales
Chapter 1505 of National Active & Retired Federal Employees

...Dr. Wong has a wealth of knowledge on many aspects of economics, including how to maximize one's retirement income and how to minimize investment risks...

Michele M. Smith
Phoenix Chapter of the Arizona Education Association Retired

LIBRARIES

...He was able to engage and captivate an audience for two hours with his financial candor, insight, humor and outstanding speaking skills...

Ted Liebler - Chandler Hamilton Library

LIFELONG LEARNING GROUPS

...he was not selling any financial product, he was educating those who came to listen and learn about better ways for investing...

Vivian Loefts - RISE Lifelong Learning Group, Rio Salado Comm. College

ARIZONA REPUBLIC READERS

...In all of our years of doing business with various banks, stock brokers and credit unions, we are of the opinion that we should have met him earlier in our lives...

Robert & Phyllis Wilson

REAL ESTATE

...We need to deal in reality right now in this market, and your laser focus on reality is just what we need to hear...

Richard H. Jones - Estate Capital Funding

On April 6, 2018, I attended a presentation by Dr. Harold Wong entitled, "How to Save Major Tax in 2018" at the Caliber Summit at the Crowne Plaza Hotel in Phoenix.

Dr. Wong's presentation was extremely informative, presenting sophisticated planning techniques that could be utilized to minimize tax liabilities. I had never seen a presentation covering such seemingly disparate topics as: (a) tax deductions through defined benefit pension plans; (b) newly-expanded Section 179 expensing for business equipment; and (c) 30% solar energy investment credits. He covered several complicated examples in a manner that enabled his audience to comprehend the substance of his inventive structures, and suggested structures that could be appropriate for both aggressive (and not-so-aggressive) persons.

Dr. Wong's high-energy style kept his presentation moving quickly, and he afforded no one in the audience a chance to be bored.

Attorney Charles R. Berry - Clark Hill PLC

VA EMPLOYEES

...I have been to other similar seminars in the past, both in Ohio and Arizona, and I am delighted to report that your seminar is the best one I have ever attended! The information you provided really helped me understand the ins and outs of federal benefits and how what I do now can affect my future 5, 10, 20, or 40 years from now. Understanding the TSP benefits made a real difference in how I allocate my funds... God bless the work you do and the people you help. It is rare to find caring individuals who not only do a job they love and do it well, but do it in the spirit of serving others at the same time...

Marilyn R. Branson

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