

Have You Created an Estate Plan for Your Family?



Please join us for an informative event.

An estate plan is a map of how you want your personal and financial affairs to be handled in the future. An effective estate plan can help ensure that your family's financial needs will be taken care of, and that your personal wishes will be carried out in the manner you intended. It's a critical part of your overall financial plan.

In this seminar on Estate Planning Basics, you'll learn:

- Why you need an estate plan
- Strategies to plan for incapacity, including special health care directives
- Wills, trusts, and life insurance
- Key tax basics, including an overview of the federal gift tax, estate tax, and generation-skipping transfer tax

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.

When & Where

Event Location:
123 Main Street or Zoom link
Wednesday, March 3, 2021
10:40 AM to 12:40 PM

R.S.V.P.

To reserve your spot, please contact me at:
Registered Rep Phone
[Registered Rep email address](#)



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