Do You Have a Loved One With Special Needs?

Please join us for an informative event.

Planning for the personal needs and financial security of a loved one who is disabled or has special needs may seem overwhelming, but by proceeding in an organized fashion, you can provide for the security and well-being of a loved one.

In this seminar on Special Needs Planning, you'll learn:

- How to balance your present and future needs with your loved one's present and future needs
- Steps to create and implement personal care, financial, and legal plans for your loved one
- Sources of government benefits
- The role of special needs trusts, including their interaction with Supplemental Social Security Income (SSI) and Medicaid

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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