

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](#)



Jack Smith

Wealth Advisor

1234 Medical Drive
Pottstown, PA 19464
O] 555.555.5555

jack.smith@lpl.com
www.lplatcu.com

 **LPL Financial**

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker/dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. **Sample Federal Credit Union (SCU) and Sample Wealth Management are not** registered as a broker/dealer or investment advisor. Registered representatives of LPL offer products and services using **Sample Wealth Management**, and may also be employees of SCU. These products and services are being offered through LPL or its affiliates, which are separate entities from and not affiliates of SCU or **Sample Wealth Management**.

Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA/FDIC or Any Other
Government Agency

Not Credit Union or
Bank Guaranteed

Not Credit Union or Bank
Deposits or Obligations

May Lose
Value