



FREE Parent/Professional Information Session

Financial and Legal Planning for Individuals with Special Needs

How to Care and Prepare for Your Loved One's Future

Date: Wednesday, September 29, 2021
Time: 7:00 - 8:30 P.M.
Presenters: James J. Di Gesu, CPA, PFS, MBA
Rich L. Reda, LUTCF
Lori I. Wolf, Esq.

This panel discussion will address the need to plan for individuals with special needs, the steps to take in managing your personal finances, and the legal issues required for the current and future care of your child with special needs.

Discussion topics will include:

- Planning to preserve your loved ones' eligibility for governmental benefits
 - Coordinating your family's investment and protection planning
 - Establishing and funding SNTs (Special Needs Trusts)
 - Use of trustees
- Identifying the appropriate use of trusts and selecting trustees

To attend this workshop, please register at

https://bergen.zoom.us/webinar/register/WN_YAyOggxmRSaPBlyJnIIncg