

Upper Darby School District invites you to attend a workshop on

Special Needs Planning for your loved one with a disability

Government Benefits, Estate Planning and Funding Strategies

Families with children and other dependents with special needs, no matter what the age or disability, face many serious questions about how to best prepare for the future well-being of their loved ones.

It is important to be aware of how special needs financial & estate planning is different than traditional financial & estate planning. Our goal is to make sure attendees learn the importance of integrating all the

necessary pieces into one cohesive plan, so the vision they have for their child's life can become a reality, whether they are here or not.

Topics include: Basic Estate Planning Documents, Special Needs Trusts (SNTs), Guardianship vs Powers of Attorney, ABLE Accounts, "3 Person Retirement", Tax Planning Considerations, Funding Strategies for a SNT, among others!

Learn more about Upper Darby School District at: <https://www.upperdarbysd.org/domain/54>



EVENT DETAILS

Monday, November 11th 6:00 pm

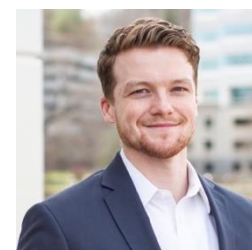
Location:

**District Administrative Office, 8201
Lansdowne Avenue, Upper Darby, 19082**

PRESENTED BY



Pat Bergmaier,
ChSNC®, CFP®



Brian Kelnhofer,
ChSNC®, WMCP®



Brett Garrison

1847Financial®

Please RSVP via zoom link above!
pbergmaier@1847financial.com or cell: 215-317-4143

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