

Chester County Down Syndrome Group Invites You to Attend a workshop on:

Planning For Your Loved One with Special Needs: What Every Caregiver Needs to Know



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!

Wednesday November 6th, 6:30-8:00pm

Chester County Intermediate Unit
455 Boot Rd
Downingtown, PA 19335

***CCDSIG is hosting this event for the entire
special needs community to benefit so all are
welcome to attend!***

Presented By:

Patrick Bergmaier*, CFP®, ChSNC™ **1847Financial**
Randy Hope Steen, Esq.

Please RSVP to Pat:

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