Estate Planning Workshop

Beneficial to Any Age Group!

- August 1, 2017 Medicaid Law Changes
- Financial Powers of Attorney - New law changes will be discussed
- Medicaid Assistance - Eligibility & Estate Recovery
- An Intro to the use of Wills & Trusts
- How to Use Beneficiary Designations to Avoid Probate
- Organizing your Assets
- Funeral Trusts & Legacy Gifting
- Life Insurance Policy Review - Why everyone should review their coverage

Estate Planning New Year's Resolution!

This Year Resolve to Give you and your Family Peace of Mind

WEDNESDAY, JANUARY 10, 2018

11:00AM-1:00PM

6:00PM-8:00PM

Location:
Eagles Club of Marshfield
1104 South Oak Avenue
Marshfield, WI 54449

Reservations required as seating is limited:
Please call Life Tributes Funeral Home at
(715) 659-4545

Light lunch and refreshments will be provided.
*If you are unable to attend the presentation, please call for a one-on-one appointment.

The dedicated staff from Life Tributes Funeral Home & Cremation Services in Spencer will be on hand to answer questions and provide information regarding:

- The importance of "Having a plan."
- Funeral Trust- What is it and why is it useful?
- Evolution of funeral services
- Share options that are both respectful and responsible while exceeding expectations

ABOUT THE PRESENTERS:

Attorney Anthony J. Schmoldt has been practicing in Wisconsin since 2006 with a focus on elder law, estate planning, and business succession. He also actively works in the areas of real estate, business organization, probate, and trust administration.

Juli McNeely – Certified Financial Planner™ focuses on estate and retirement planning for individuals. She also enjoys working with small business owners to develop and enhance business continuity and succession planning.

Rebecca Gonzalez – Certified Financial Planner™ practices wholistic financial planning which includes budgeting, risk analysis, retirement and estate planning.

Daniel Flees - Financial Representative Focuses on post-retirement needs, including funeral trusts, income distribution, estate and retirement strategies. He also works with young family anticipatory college saving strategies

Presented by: Life Tributes Funeral Home.
Guest Speakers from Schmoldt Law Office and McNeely Financial Services