



# Presents A Learning Workshop

*Light meal & educational topics will be provided at no cost.*

Beneficial to all, regardless of age or assets.

**TUESDAY, OCTOBER 10, 2017 @ 6:00PM**

**THURSDAY, OCTOBER 12, 2017 @ 11:00AM**

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## **Location:**

**North Central Technical College  
808 North Pacific Street(Hwy 13N)  
Spencer, WI 54479**

**Reservations required as seating is limited:**

**Please call Life Tributes Funeral Home at  
(715) 659-4545**

**\*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

- ◆ 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

## ABOUT THE PRESENTERS:

**Attorney Anthony J. Schmoltdt** 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 Schmoltdt Law Office and McNeely Financial Services**

Securities and Advisory Services offered through SII Investments, Inc. member FINRA, SIPC and a Registered Investment Advisor. McNeely Financial Services, Inc, Life Tributes Funeral Home and Schmoltdt Law Office, LLC are separate companies. SII does not provide tax or legal advice.