

PLEASE JOIN US FOR A **FREE**
ESTATE PLANNING WORKSHOP

BY FAILING TO
PLAN YOU ARE
PLANNING TO FAIL

- LEARN WHY IT'S IMPORTANT TO PLAN
REGARDLESS OF AGE OR NET WORTH



Take the Fear Out of the Estate Planning

Learn about the basic tools of estate planning and get answers to questions, that you may have:

- Do I need a Will? What is a trust? What is probate?
- Who will care for my loved ones in the event of my death or incapacity?
- If death occurs, would my loved ones know my wishes?
- How do I know whether a loved one might be developing dementia?
- How will I pay for long-term care for myself or my spouse?
- What happens with a Roth or IRA upon death? What about an annuity?
- How important are my beneficiary choices on my IRA or 401(k)? And much more!

Panel of Speakers

- Attorneys: Aaron Roepke & Anna Lim-Mikkelsen
- Author & Founder of DAWN: Judy Cornish
- DA Davidson Financial Advisor & Portfolio Manager: Rusty Schatz
- Shorts Funeral Chapel: Dave Hutton

- This workshop is a public service offered by St. Mary's Foundation.

FREE

Appetizers & Beverages

Location: 1912 Event Center

Date: April 30, 2018

Time: 5:30-7:30

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