What Is Special Needs Planning?

Date: January 15, 2014/ Time: 6:30 pm
Location: Mid-Island Y JCC
• 45 Manetto Hill Road
• Plainview, NY 11803

The Basics of Special Needs Planning.

This is one of several workshops to provide the attendee with an understanding and application of the essential planning topics necessary to manage your financial life. This information will provide you with a comprehensive financial foundation, along with advanced planning strategies to help you plan for a successful financial future.

The following Retirement Planning subjects will be covered:

- ✓ *The Statistics*
- ✓ *What Is Special Needs Planning?*
- ✓ *Goals of Special Needs Planning*
- ✓ *Goals of Special Needs Planning*
- ✓ *Risks of Not Planning Ahead*
- ✓ *Planning Steps*
- ✓ *Create and Implement a Personal Care Plan*
- ✓ *Create a Transition Plan*
- ✓ *Create and Execute a Legal Plan*
- ✓ *Create and Implement a Financial Plan*
- ✓ *Sources of Government Benefits*
- ✓ *Special or Supplemental Needs Trust*

***Instructor: Michael J.* Aluotto**

About the Instructor: Mr. Aluotto is the President of Vertex Wealth Management, LLC and is an independent Private Wealth Manager with the broker dealer First Allied Securities, Inc.

Reserve your seat:
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