FINANCIAL WEBINAR SERIES

We continually strive to educate on relevant financial planning topics. This summer we will be offering free virtual seminars. Reservations are required, please respond with your interest and contact details (email and phone number) to receive the Zoom webinar information that is sent closer to the event date. You may contact me directly with any questions. I hope you will join us!

Register: **Planning for a Lifetime of Care**

7/25 10:00 AM – 12:00 PM EST
Matt Stagner CFP®, ChSNC® Voya Financial

Do you or someone you know care for a loved one with special needs or disabilities? An entire family can be impacted when a loved one has special needs or disabilities. Knowing where to start can be the hardest part. We'll help guide the way so you can focus on what matters most. Four key areas will be covered: family assets and planning, government benefits, employer benefits, and legal planning.

Register: **Social Security & Retirement**

7/26 10:00 AM – 12:00 PM EST
7/26 4:00 PM – 6:00 PM EST
Aaron Cahill, MBA, CRPC®
Voya Financial Advisors

Integrating Social Security into your retirement plan. Social Security is an important source of income for many retired Americans. Understanding how Social Security works - and what it provides - can help you determine whether you're on track for the retirement you envision. Helping you make a more informed decision, access to a resource to make sure your benefits are optimized to your personal plan and getting important answers to your retirement planning questions. By attending, you will receive access to a free Social Security analysis to provide you with the details about different claiming scenarios to consider.

Register: **Estate Planning**

7/27 10:00 AM – 11:30 AM EST
Nicole K. Reed, Esq.*
Reed Law PLLC

Attorney Nicole K. Reed, Esq. will cover Estate Planning topics and answer questions throughout: what is estate planning, different methods assets are passed on, wills, trusts: revocable vs. irrevocable, Medicaid asset protection trusts, special needs trusts, and more. Attorney Reed has worked as a Paralegal for over 25 years in Estate and Real Estate Law, helping many families in the Central New York Area. She graduated from Syracuse College of Law in 2020 with a desire to continue in these areas of law, improving families' experiences and promoting estate planning in a way that is natural and comfortable. These are not always easy legal matters to discuss, especially with a stranger. Attorney Reed wants families to leave her office feeling better, knowing they are understood and knowing she is on their team, looking out for their best interests.

Thank you,

Aaron Cahill, MBA, CRPC®
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To Schedule a Meeting!: **http://cahill.timetap.com/#/**