Bergen County Special Services

CAPE

Resource Center

Collaboration
Access
Planning
Education

FREE Parent/Professional Information Session

Financial and Legal Planning for Individuals with Special Needs:

How to Care and Prepare for Your Child's Future

Date: Tuesday, September 26, 2017

Time: 6:30–8:30 P.M. ***(Registration begins at 6:15)***

Presenters: James J. Di Gesu, CPA, PFS, MBA
Rich L. Reda, LUTCF
Lori Wolf, Esq.

This panel discussion will address the need to plan for individuals with special needs, the steps to take in managing your personal finances, and the legal issues required for the current and future care of your child with special needs.

Discussion topics will include:

- Coordinating financial and legal planning to create a sound strategy
- The need for early and comprehensive planning
- Differences between financial planning and "special needs" planning
- Using financial planning tools
- Leveraging and protecting family assets

Participants will gain knowledge of:

- The steps to take today as they plan for their child's future
- Funding requirements and the use of Special Needs Trusts
- Protection of family members and family assets
- Accessing government benefits (SSI, Medicaid)
- Establishing Guardianships
- The pros and cons of the ABLE (Achieving a Better Life Experience) Act

This Information Session will be held at the

BCSS Education Center
2nd Floor Training Room
540 Farview Avenue
Paramus, NJ 07652

Limited Seating Capacity
Early Registration is Advised

To register online, visit http://cape.bergen.org

Registration Confirmation is by email only

Please contact Connie at
201-343-6000 ext.4076/
conpel@bergen.org
for questions about registration