SPECIAL NEEDS PLANNING WEBINAR

REGISTER TODAY

The purpose of this webinar is to provide families with confidence and clarity around planning for the future of their loved one or child with special needs.

TOPICS:

- Why plan?
- ABLE accounts
- Special Needs Trusts
- Strategies to Fund a Trust
- Open Q&A

WHEN:

Tuesday, June 8th, 6:00 pm EST
Saturday, June 12th, 12:00 pm EST

WHERE:

Zoom, Meeting ID: 859 302 1223

Nick Wallace is a financial advisor specializing in helping families plan for their children with special needs. Nick serves as co-guardian and future trustee for his brother, Aaron, who has physical and intellectual disabilities.

Text WEBINAR to 859.446.5566 to register

"As a mom of a child with special health care needs, it was important to find someone who understood our unique situation. Nick continues to be this person for our family. He is easy to talk to, available to answer any questions or concerns, and he's genuinely invested in what's best for the families he serves."

-AMY

"Ken and I attended Nick's workshop. We learned so much about planning for our children, especially regarding the special needs trust. We had put this off for so long because we were not sure where to start. After learning about our options, we worked along with Nick and a local special needs attorney and are confident our children will be provided for should something unforeseen happen."

- DIANE

The testimonials presented may not be representative of the experience of all clients and are not a guarantee of future performance or success.

Questions or to speak with the team directly:
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NICK WALLACE

It wasn't until I started as a financial advisor with Northwestern Mutual that I realized my family had gaps in our planning. While we did have a financial advisor who handled some retirement accounts and other investments, we did not have a true financial or legal plan for Aaron, my brother, who has disabilities as a result of a brain injury.

We had heard the terms "special needs trusts" and "special needs planning" but it seemed overly complex and we were unsure of where to start. After a process of financial planning, legal planning, and family meetings around the kitchen table, we achieved peace of mind knowing that we had done what was in our power to plan the best possible outcome for Aaron's future.

At the time, I realized that most families, like us, didn't have access to the information or professional resources necessary to know where to start in planning. Because of this lack of information and resources combined with the fact that these conversations are difficult by nature, many families are unable to complete these important plans for their child's future.

The purpose of my webinar is to help families overcome the same obstacles that my family faced. Through sharing simplified information, professional resources, and personal experience in my family's planning, **you will leave the webinar with confidence and clarity around the steps to take in your family's planning.**