CENTER FOR HUMAN SERVICES

Eitas

SPECIAL NEEDS. SPECIAL PLANNING.

Get key insights into the financial and legal planning needed for your near and long-term goals.

Financial & Estate Planning

Monday, April 7

6:00pm — 7:30pm

Eitas
8508 Hillcrest Rd.
Kansas City, MO 64138

Register by
Sunday, April 6
Please email Lauren White to register
lwhite@chs-mo.org

SPECIAL NEEDS PLANNING CENTER by CommunityAmerica

We're excited to bring you our new workshop, **Financial & Estate Planning for Families with Special Needs**.

This workshop brings together several key issues that families with a child with special needs face regarding their financial goals as well as the legal planning needed to make the transition from one generation to the next. In this comprehensive workshop, we'll dive into these three topics:

- **Financial Planning:** Adjusting the traditional financial planning and investment process to focus on the long-term care needs for your loved one with special needs.
- **Special Needs Trusts:** A discussion on special needs trusts and other legal documents necessary for the transition of your estate to beneficiaries and heirs.
- **Transition Tools:** An overview of software used to help organize and transition your plan to the next generation of care.
- **Guardianship:** A discussion on guardianship and continuity of care.
- **ABLE Accounts:** An overview of accounts designed to assist individuals and families to save funds for supporting individuals with disabilities.

This new workshop will be facilitated by Scott Adams, Private Wealth Advisor, Special Needs Planning, CFP™, CTFA, ChSNC®, CLU®, ChFC®. Scott will share both his personal and professional experiences of planning for his own children with special needs. Space is limited, so register today. To learn more about the Special Needs Planning Center, visit communityamerica.com/personal/invest/planning/special-needs-planning