GrowStrong Wealth Strategies

Complimentary Special Needs Planning Workshops

Unlike Traditional Planning - It's Planning for *Two* Generations!

Offered Online through Imagine! - Please Choose Either Date:

Tuesday, March 29, 2022: 6:30 pm - 8:00 pm

or

Thursday, March 31, 2022: 10:00 am - 11:30 am

Workshop Topics Include:

- Identifying current and ideal goals for your family
- Fundamentals for structuring your family's plan
- Government Benefits - their role in helping your child and how to protect them in the future
- Creating comprehensive instructions for future caregivers
- Weighing the options between Guardianship & Powers of Attorney
- How to utilize ABLE accounts & Special Needs Trusts
- Asset transition strategies
- Case Study - reviewing the benefits of a plan

Services:

- Trust account set-up and management with Fiduciary oversight
- Financial Planning that incorporates Retirement goals & next-generation objectives

As a Principal at GrowStrong Wealth Strategies, Erik Utzinger brings 20 years of industry experience in helping reduce clients' stress around financial matters and move comfortably into the next phase of their lives. He helps clients clarify, coordinate and manage multiple goals by providing comprehensive services tailored to their unique situations.

Andrea Turner grew up with an intellectually disabled sister and seeing her struggles and successes inspired Andrea to help other families. Her sister was involved with the local ARC at a young age and was the first teenager to live in an ARC residential group home. While unable to live on her own and quite challenged in some areas, her sister is also a savant with a spectacular memory. Andrea is also the mother of a lively daughter on the autism spectrum and has navigated many of the challenges unique to our community. As an Investment Advisor Representative with two close family members who have very different needs and abilities, Andrea understands how a disability can affect the whole family and how important it is to provide the best opportunities for them.

Please RSVP and we'll send you a link to join the webinar.

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