

Plan to Prosper

All folks, young and old, families and individuals, working and retired, should focus on building wealth to meet life's challenges. Today you must approach your finances with care, precision, imagination and discipline. Planning allows you to engage your risks in order to minimize them. But it takes knowledge. Please join us for this lecture series where experts will share with you knowledge important to your decision making.

THE THOUGHTFUL ESTATE PLAN

May 9th: 6-7:30

Renee Harvey Counselor at Law

Estate planning – is about coming to terms with the fact that ultimately we all lose control, either because of incapacity or death. Planning ahead can give you greater control, privacy and security of your legacy. In this session you will learn some basic principles on how and why taking action now and reviewing periodically will help you, your helpers and your beneficiaries.

Register sboyle@sjboylewealthplanning.com or at sjboylewealthplanning.com/events

HOW TO MAKE YOUR SAVINGS LAST - INTELLIGENT INCOME PLANNING

May 23rd: 6-7:30

Sally Boyle CFP, CDFIA

Social Security serves as an important pillar to our retirement income. But when should we take it? And how should we coordinate it with our other pillars, our savings and retirement accounts? Join us in discussing the important considerations in maximizing your retirement income.

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PLANNING FOR THE POSSIBILITIES -

THINKING ABOUT LONG TERM CARE LONG BEFORE YOU NEED IT

June 6th: 6-7:30

George Curt CLU, ChFC, CIC - Sally Boyle CFP, CDFIA

Medicare choices can be complicated. Most long-term care isn't medical care so not covered by Medicare. Given that two out of every five people reaching age 65 need some type of long-term care, how can we best prepare for both health care and LTC? Join us to talk about both Medicare and long term care choices and how to view and coordinate each.

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Location: Holiday Inn Express in White River Junction Vermont Price: \$35 per class

SALLY J BOYLE
wealth planning