WATERFORD
Wealth Management

Presents:

“Estate Planning 101”

A seminar that you do not want to miss! Brought to you by Waterford Wealth Management- Experts in Federal Benefits.

- What is an estate plan?
- The basics of wills and trusts.
- The importance of reviewing beneficiary designations.
- Healthcare and financial directives.
- Blended family strategies.
- Gifting strategies, lifetime exemptions, and other important items

The speaker will be answering questions throughout the presentation as well. Please RSVP at: davidvoorhees@waterfordwealthmanagement.com

When: Thursday, May 11th at 12 noon

Where: South Building Cafeteria Room 3

Presented to the USDA with the help of ESRA

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