



# OAKWOOD SCHOOL

## Tuition as a Tax Deduction? Special Education Financial Considerations

Presented By: Jerry L. Hulick, CLU, ChFC, ChSNC, CLTC and Pearl Hartley, Special Care Planner

---

Families with special needs individuals face numerous unique financial, legal and tax challenges. Although these issues are complex, and many times exhausting, having an integrated financial plan is critical. This workshop will provide a financial and legal overview with an eye towards special needs to include the integration of employer and government benefits. Other topics that will be discussed are special needs tax related issues such as provisions that impact educational expenses for private school, educational tax deductions and more. Tax advantaged ABLE Accounts will also be discussed. When an inclusive plan is in place your family's future will be secure.

**DATE:** Tuesday, February 9th, 2021

**TIME:** 7:00PM - 8:00PM

**LOCATION:** Virtual via Zoom (link will be sent closer to the presentation date)

**REGISTRATION:** Email [oakwood@oakwoodschoool.com](mailto:oakwood@oakwoodschoool.com) to RSVP for this event



***Jerry L. Hulick, CLU, ChFC, ChSNC, CLTC***

Jerry is the Principal at the Washington Group Special Care Planning Team. Jerry has been active in the financial services industry for over 40 years. He has received specialized training in legal, financial and tax planning for individuals with special needs and was one of the first people in the country to receive the Chartered Special Needs Consultant (ChSNC) designation from The American College. Jerry has spoken around the country on Special Needs topics and is on the Editorial Board of Exceptional Parent Magazine and on the Board of The American College & MassMutual Center for Special Needs Planning.



***Pearl T. Hartley, Special Care Planner***

Pearl has been active in the financial services industry for over 37 years. She has received specialized training in financial planning for individuals with special needs through the Special Care Planner designation. Pearl has spoken all over the country on planning for families with special needs. Pearl is also a House Representative for The Brain Foundation, a non-profit organization that provides housing for individuals with mental illness.