THE INSTITUTE ON AGING AT MISERICORDIA UNIVERSITY

THE 3 CARDINAL RULES FOR PLANNING YOUR ESTATE AND PROTECTING YOUR ASSETS

Free workshop presented by:
Nicholas D. Lutz, Esq.

Cardinal ESTATE PLANNING

Wills, trusts, powers of attorney, Medicaid planning, probate. **How do you know where to start?** Top estate planning attorney Nick Lutz will detail the three steps involved in protecting your assets:

1. **Knowing the Rules**
2. **Knowing the Threats**
3. **Knowing Your Options**

YOU WILL ALSO LEARN:

- How to protect your hard-earned assets from the high cost of long-term care and other threats
- How to avoid the delays, frustration, and expense of probate
- The 7 reasons you need an estate plan
- The key planning documents everyone needs—and why
- Eligibility requirements for Medicaid and other sources of financial assistance to pay for long-term care
- The benefits of long-term care insurance
- The advantages of trusts and the planning objectives they can help you achieve
- How to minimize or avoid estate and other taxes

YOU DON'T WANT TO LEAVE YOUR FUTURE TO CHANCE!



Nicholas D. Lutz, Esq.

A lifelong resident of Pennsylvania, attorney Nick Lutz focuses on elder law, asset protection, estate planning, and closely related practice areas. Over the course of his career he has helped hundreds of families in northeast and central Pennsylvania protect their assets from nursing home costs and enjoy the peace of mind that comes from having a comprehensive estate plan in place for the future.

Nick founded Cardinal Estate Planning to create a boutique environment dedicated exclusively to meeting the short- and long-term planning needs of the community he calls home. He takes a highly personal approach to the practice of law and can be described as a "family counselor for life." He devotes all the time and energy necessary to gain a thorough understanding of his clients' unique needs and explains their options in clear language devoid of confusing jargon. Nick then uses his experience and mastery of the law to design a customized plan capable of meeting all of a particular client's needs and goals. Nick believes this level of collaboration is the key to effective planning.

WORKSHOP DETAILS

PLEASE SCAN TO REGISTER

Date: March 5, 2024
Time: 12:00 pm – 1:30 pm
Location: McGowan Room, Library

This workshop is hosted by the Institute in Aging, a collaboration between the Department of Social Work and The Center for Adult & Continuing Education at Misericordia University. Questions can be directed to Paul Nardone pnardone@misericordia.edu or phone 570-674-8130.

Please feel free to bring your lunch. Soft drinks will be provided.

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