

Special Needs Planning

Advanced Workshop



Nick Wallace ChSNC®, **RICP®** serves as co-guardian and trustee for his brother, Aaron, who has physical and intellectual disabilities. Nick is the Founder and Financial Advisor of Wallace Financial.

Tuesday, Sept. 3rd at 12pm EST
Wednesday, Dec. 4th at 12pm EST

LIVE ON ZOOM

To Register Scan QR Code or
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Topics Covered

- Review of Special Needs Planning
- Trustee/Trust Protector Selection
- Quality of Life Planning
- Financial Planning Strategies
- Q & A Session

Email our team directly or visit our website to learn more about Special Needs Planning
email: nick.wallace@nm.com website: nickwallace.nm.com