

SPECIAL NEEDS PLANNING WORKSHOPS

BEGINNER'S SPECIAL NEEDS PLANNING



Our foundational workshop on Special Needs Trusts, ABLE accounts, and planning for the future, with 3 goals in mind:

- 1) Simplify this topic that can seem complex and overwhelming.
- 2) Help families be courageous to work through conversations that can be difficult.
- 3) Be a resource, and a connector of resources, for families to get started in this planning.

ADVANCED SPECIAL NEEDS PLANNING



A workshop is designed for families or professionals who already have a foundational understanding of Special Needs Trusts, government benefits, ABLE Accounts and Special Needs Financial Planning.

During the workshop, we take a deeper dive on the mechanics of a 3rd Party Special Needs Trust and the Financial Plans to fund it.

LETTER OF INTENT WORKSHOP



A hands-on activity where participants on the call will be led through the process of drafting a letter of intent for their loved one's future in live time.

Families can expect to leave this workshop with information on the letter of intent, how it works, and also their first rough draft of the document.

To **REGISTER** and see scheduled events, visit nickwallace.nm.com and click on the **EVENTS** tab



NICK WALLACE, CHSNC[®], RICP[®]

Nick Wallace is the Founder and Wealth Management Advisor of Wallace Financial, who's mission is to create more secure futures for individuals with disabilities and their families.

Nick's passion for this work comes from his personal experience in overcoming the challenges that his family faced while creating a plan for his brother, Aaron's future.

Wallace Financial is offering these workshops at no cost or obligation to participants as a part of our free education initiative, which is built on the belief that all families should have the opportunity to understand the steps to take in planning for a loved one with disabilities.

Please share with other families or professionals who may benefit from this information!

- Parents/Grandparents of children with disabilities
- Teachers/Professionals in Special Education
- Therapists or Case Workers
- Non-profit organizations or support group leaders



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WEBSITE: NICKWALLACE.NM.COM