

The Pottsgrove Village invites you to attend a workshop on

# Special Needs Planning for your loved one with a disability

**Government Benefits, Estate Planning and Funding Strategies**

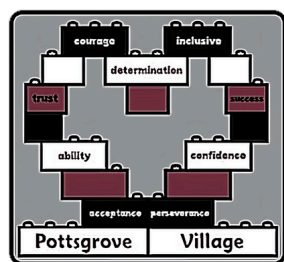
Families with children and other dependents with special needs, no matter what the age or disability, face many serious questions about how to best prepare for the future well-being of their loved ones.

It is important to be aware of how special needs financial & estate planning is different than traditional financial & estate planning. Our goal is to make sure attendees learn the importance of integrating all the

necessary pieces into one cohesive plan, so the vision they have for their child's life can become a reality, whether they are here or not.

**Topics include:** Basic Estate Planning Documents, Special Needs Trusts (SNTs), Guardianship vs Powers of Attorney, ABLE Accounts, "3 Person Retirement", Tax Planning Considerations, Funding Strategies for a SNT, among others!

Learn more about The Pottsgrove Village at: [www.pgisd.org/community/the-pottsgrove-village](http://www.pgisd.org/community/the-pottsgrove-village)



### **The Pottsgrove Village**

*A collaboration between families of children with special needs and the school district's Special Education Department with a goal of increasing understanding, inclusion and advocacy through education and networking.*

Event Details:

**Wednesday, April 30th**

**6:00 pm - ZOOM**

Registration Link:

**<https://bit.ly/4hzwIjp>**

PRESENTED BY



**Pat Bergmaier,**  
ChSNC®, CFP®



**Brian Kelnhofer,**  
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**Brett Garrison,**  
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Please RSVP via zoom link above!

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