MAKING THE FUTURE MORE SECURE

FOR YOUR DEPENDENT WITH SPECIAL NEEDS



25 APR, 2023 6:00PM





PRESENTED BY: DOUGLAS A. VOGEL, FINANCIAL SERVICES EXECUTIVE, SPECIAL CARE PLANNER, MASSMUTUAL

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THIS WORKSHOP WILL DISCUSS WHAT A LIFE CARE PLAN IS AND THE STEPS RECOMMENDED TO CREATE ONE FOR A LOVED ONE WITH SPECIAL NEEDS. AS A CAREGIVER OF A DEPENDENT WITH SPECIAL NEEDS THE SINGLE MOST IMPORTANT ISSUE ON YOUR MIND, REGARDLESS OF THE AGE OF THE DEPENDENT, IS WHAT WILL HAPPEN TO MY DEPENDENT AFTER I'M GONE. THERE ARE SOME NEEDS THAT WILL ALWAYS BE PRESENT AND THEY MUST BE CAREFULLY CONSIDERED AND PLANNED FOR APPROPRIATELY. THIS WORKSHOP WILL ADDRESS SUCH CRITICAL ISSUES AS PROTECTING GOVERNMENT BENEFIT ELIGIBILITY FOR SUPPLEMENTAL SECURITY INCOME (SSI) AND MEDICAID, CREATING SPECIAL NEEDS TRUSTS, THE IMPORTANCE OF A WILL, GUARDIANSHIP, FINANCIAL STRATEGIES INCLUDING ABLE ACCOUNTS AND PREPARING LETTERS OF INTENT. YOU WILL LEARN ABOUT THE COMPREHENSIVE STEPS, AVAILABLE RESOURCES, AND NECESSARY TOOLS TO HELP DEVELOP YOUR PERSONAL AGENDA – A CUSTOMIZED PATH THAT WILL KEEP YOU ON TRACK AS YOU CONSIDER WHAT'S RIGHT FOR YOUR SITUATION. FOLLOWING THE PLANNING STAGES CAN HELP INSURE THE TYPE OF CARE AND QUALITY OF LIFE FOR YOUR LOVED ONE'S WELL-BEING TODAY AND TOMORROW.





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