



## FREE Parent/Professional Information Session

### Financial and Legal Planning for Individuals with Special Needs: *How to Care and Prepare for Your Child's Future*

**Date:** Tuesday, September 25, 2018  
**Time:** 6:30–8:30 P.M. *(Registration begins at 6:15)*  
**Presenters:** James J. Di Gesu, CPA, PFS, MBA  
Rich L. Reda, LUTCF  
Lori Wolf, Esq.

This panel discussion will address the need to plan for individuals with special needs, the steps to take in managing your personal finances, and the legal issues required for the current and future care of your child with special needs.

#### *Discussion topics will include:*

- Coordinating financial and legal planning to create a sound strategy
  - The need for early and comprehensive planning
- Differences between financial planning and “special needs” planning
  - Using financial planning tools
- Leveraging and protecting family assets

#### *Participants will gain knowledge of:*

- The steps to take today as they plan for their child's future
- Funding requirements and the use of Special Needs Trusts
  - Protection of family members and family assets
  - Accessing government benefits (SSI, Medicaid)
  - Establishing Guardianships
- The pros and cons of the ABLE (*Achieving a Better Life Experience*) Act

*This Information Session  
will be held  
at the*

**BCSS Education Center  
2nd Floor Training Room  
540 Farview Avenue  
Paramus, NJ 07652**

**LIMITED SEATING CAPACITY  
EARLY REGISTRATION IS ADVISED**

**To register online,  
visit <http://cape.bergen.org>**

**Registration Confirmation  
is by email only**

**Please contact  
Connie at  
201-343-6000 ext.4076/  
[conpel@bergen.org](mailto:conpel@bergen.org)  
for questions about registration**