

SPECIAL NEEDS PLANNING WORKSHOP

A workshop designed to provide families and professionals confidence and clarity in planning for the future of a child or loved one with disabilities

WHEN

May 22nd at 12 PM ET

June 26th at 6 PM ET

July 30th at 12 PM ET

(please pay attention to time zone)

WHERE

ZOOM

Register for Link



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, who's mission to create more secure outcomes for families and their loved ones with disabilities.

Topics Covered:

- Why Plan?
- Nick's Personal Experience
- ABLE Accounts
- Special Needs Trusts
- Financial Strategies
- Open Q & A



To Register Scan QR Code or Go To:
nickwallace.nm.com and click on "Events"



Email our team directly or visit our website to learn more about Special Needs Planning

email: nick.wallace@nm.com

website: nickwallace.nm.com