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

Topics Covered:

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

WHEN

February 20th at 12:00 PM EST
March 6th at 6:00 PM EST
March 26th at 12:00 PM EST

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.

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*