

# Special Needs Planning

## *Advanced Workshop*



**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.*

Email our team directly or visit our website to learn more about Special Needs Planning  
email: [nick.wallace@nm.com](mailto:nick.wallace@nm.com)

**Monday, June 17th at 7pm ET**

**Tuesday, September 3rd at 12pm ET**

**LIVE ON ZOOM**

To Register Scan QR Code or  
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## **Topics Covered**

- Review of Special Needs Planning
- Trustee/Trust Protector Selection
- Quality of Life Planning
- Financial Planning Strategies
- Q & A Session

website: [nickwallace.nm.com](http://nickwallace.nm.com)