



## Financial Planning and Protecting your Benefits for Families with Special Needs

### Session topics include:

- Simplifying Financial Planning
- How to protect your benefits while planning for the future
- Understanding Special Needs Trusts and CA Able accounts
- Basics of Estate Planning

### Presenters:

**Jaril Tudio** Insurance Consultant for Spinnaker Investment Group. Her focus is on adding value to her clients' lives by assisting them to create wealth while planning on the eventual transfer and distribution to their loved ones.

**Kay Walker** is an estate planning attorney with 25 years of practice . Her legal specialty is built on a foundation of compassion, personal experience and understands the importance of planning for you and your family's future.

### Class Information

Tuesday, August 11<sup>th</sup>, 2020  
6:00 PM - 8:00 PM

### Registration is Required:

Register [HERE](#).

Cost: \$20 per family

Payment is due at the time of registration

Location :



**Registration:** Space is limited - **Registration is required!**

[Enroll Online](#), email [centertraining1@uci.edu](mailto:centertraining1@uci.edu) or call us: **949-267-0227**

Sponsorships are available upon request for families in need of financial assistance. No childcare provided.