

TRUSTS AND STABLE ACCOUNTS: WHAT FAMILIES NEED TO KNOW

Hosted by:
Hamilton County Developmental Disabilities Services
The Future is Now Project
Families in the Know

TUESDAY, AUGUST 28 6:30-8:30 pm

Hamilton County DD Services Kingsley Center

5093 Kingsley Drive, Cincinnati, OH 45227

This session offers an opportunity for families to learn:

- ▶ What is a special needs trust?
- ▶ How do I know if this is right for me?
- ▶ What are some things to consider about trusts?
- ▶ What are pooled trusts and what benefits do they offer?
- ▶ How can a stable account be used in combination with a trust?

Presenters:

Barry Jamieson, CFP®, MA is a financial planner for CMP Financial Planning, and is responsible for managing client data and producing client plans. His healthcare policy background gives him expertise in the important areas of financial planning, long-term care, and disability, as well as a broad base of knowledge of Medicare and Medicaid.

Laura Drake, Esq., is Southern Ohio Associate Director for the Community Fund Management Foundation (CFMF) a nonprofit, tax-exempt (501c3) foundation that develops trusts, educational programs, and related services that enable people with disabilities to use private funds to enhance their quality of life while safeguarding eligibility for government benefits.

Bring a partner, ally, or friend!

Planning a good life and financial security for your family member is easier and better if you don't try to do it alone. Please invite at least one person to attend this session with you. You'll learn more and remember more if you can talk with someone about it after the session!

There is no charge to attend this session.

In order to prepare materials, we ask that you register here: www.hamiltondds.org/trusts

For questions, contact: dawn.freudenberg@hamiltondds.org