

Financial Seminars



Crucible Brewing Brewery Tour and Financial Discussion

Join us for happy hour, a financial discussion, and a tour of Crucible Brewing, started in late 2015 by two childhood friends with an absolute passion for craft beer.

This is a fun way to visit with friends while having an open discussion with Pacific Group Advisors' Eli Mizrahi and Mike Sondheim, former hosts of *Securing your Retirement* on KLAY. Topics will include IRA and 401k funds for long-term care, wills versus trusts, how and when to apply for Social Security benefits, and Medicare Supplement or Medicare Advantage.

Note: No tickets will be sent; check in at the brewery. *The financial discussion content is not sponsored or endorsed by the Boeing Leadership Network or The Boeing Company and is intended for educational purposes only.*

Date: Tuesday, October 23

Time: 4:30 p.m.

Cost: Free (RSVP required)

Deadline: Monday, October 22

Location: Crucible Brewing—Everett Foundry,
909 SE Everett Mall Way, Everett

Event Coordinator: Robert Reichle, 425-337-2906,
robert_R_R52@yahoo.com

Instructions: Contact Mike Sondheim, 425-417-9813 or
michael@pacificgroupadvisors.net, for reservations. ♦

Estate Planning and Tax Update Getting Your Core Documents in Order

Every day, approximately 6,927 people in the United States die without a proper estate plan. In addition to dealing with their grief, families may also have to struggle through the process of probate and distributing assets without the benefit of the deceased's instructions.

In this seminar, Michael Miller, of Capital Planning, and guest speaker Doug Phillips, of Phillips Estate Law, will cover the intricacies of estate planning, such as whether or not to use certain types of trusts and how to protect certain estate assets from creditors, minimize exposure to estate taxes, maximize income tax deferral of IRA accounts, and ensure life insurance proceeds and IRA accounts pass to the intended beneficiaries. Discussion will also include choosing a power of attorney, trustees, personal representative, and guardian, as well as communicating with and preparing beneficiaries for their inheritance.

Note: Lunch is provided. *Capital Planning, LLC, is an SEC-registered investment adviser. The seminar content is not sponsored or endorsed by the Boeing Leadership Network or The Boeing Company and is intended for educational purposes only.*

Date: Wednesday, November 7 **Time:** 11:30 a.m. **Cost:** \$5

Location: El Gaucho, 450 108th Ave. NE, Bellevue

Event Coordinator: Pete Bailey, 206-232-9451,
peterb00001@onebox.com

Instructions: Complete the BLN Retirees event coupon and mail it with a check payable to BLN to Pete Bailey, 4708 E Mercer Way, Mercer Island, WA 98040. ♦

Community Outreach



Seattle Center 22nd Annual Puget Sound Buddy Walk

The Buddy Walk brings together family, friends, professionals, and community leaders from across

Puget Sound for a day of celebration to promote acceptance, inclusion, and respect of individuals with Down syndrome.

Date: Sunday, October 14

Time: 1:00 p.m.

Cost: Free

Deadline: Friday, October 12

Location: Seattle Center, Founders Court, 305 Harrison St., Seattle

Event Coordinator: Mark Wyciskala, 253-259-5615,

mark.m.wyciskala@boeing.com

Instructions: Visit <http://downsyndromecommunity.org/puget-sound-buddy-walk/> for more information and to sign up. ♦

BLN Retirees Event Coupon

Print, fill out, and mail this completed coupon with a self-addressed, stamped business envelope and check payable to BLN to the event coordinator.

Member Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

E-mail: _____

Number of Tickets (designate number and type, such as child, adult, senior): _____

Event Name: _____

Event Date: _____

Event Time: _____

CANCELLATION POLICY

**Please note that all sales are final.
Ticket purchases are nonrefundable.**