Financial Planning Seminars

Free Seminar

Basics of Estate Planning & the New Secure Act Explained

Classroom topics:
Importance of legal docs: Will or trust? Non legal explanation of will, probate, trust (there are many types) POA & health care directive

HIPAA - health insurance portability and accountability laws 1996 compliant and the need to review and update legal docs

Ways to avoid probate: Banks requirements, Insurance requirements, Trust requirements

Inheritance taxes: Federal and State

Asset Transfer to kids: Reasons why it isn't advised to transfer assets to children while living

The Effects of The SECURE ACT: What changes included The SECURE ACT effect your Estate Planning ability. What important Estate Planning Tool was eliminated by The SECURE ACT and potential workarounds.

Different asset types tool chest: Risk Assets, Safe Assets, Hybrid Assets

Money lasting throughout lifetime Concerns: Longevity, inflation, taxation, planning for potential future health care costs

CLASSROOM INSTRUCTION will be by Eli Mizrahi, founder of Pacific Group Advisors and Past President of AFEA* (American Financial Educational Alliance) Tacoma WA Chapter. Eli has over 35 years experience in the financial services industry, co-hosted 3 Retirement Planning Radio shows in the past and has been published in Forbes. Eli brings "real world" experience to the classroom, conveying the subject matter effectively by including illustrations of real-life scenarios that make the content easier to understand. This session will cover some of today's most relevant and challenging questions.

Date: Thursday, March 5 Time: 10:30 am to 11:30 am
Location: The Julian Estates Gracious Retirement Living, 13305 94th Avenue East, Puyallup, WA 98373

Your BLN and BLN Retires Host is Robert Reichle

- **Instructions: SIGN UP – contact Eli Mizrahi by phone (206) 356-5682 Please provide Name(s) of attendees, a Phone number and Contact Email (to allow notification in the event of last minute changes), and let him know that you are with the Boeing Leadership Network.**

*The American Financial Educational Alliance is recognized by the IRS as a 501(c) (3) non-profit charitable organization that provides educational workshops and classes in businesses and universities nationwide.