Financial Planning for Families with a Special Needs Child

Presented by:

Comprehensive Financial Planning Group, LLC

Sunday, March 29, 2020
2:00 p.m.

Grand Point Church ▪ Room B20
2230 Grand Point Road ▪ Chambersburg, PA

Brian S. Young, CFP®, with Comprehensive Financial Planning Group, LLC., will outline the fundamentals to the financial planning process for families who have a child with special needs.

Mr. Young draws from his 20+ years of experience in the financial services industry and having a son who has autism.

Focus Points Include:

- Addressing the impact of the individual with the disability on the core family unit for guardianship.
- Retirement planning strategies for parent(s) with a special needs individual at home or in other accommodations.
- Survivorship and estate planning techniques. Learn about Special Needs Trust/Supplemental Needs Trust.
- Impactful ways for grandparents or parents to pass assets or continue income to the next generation.

Brian S. Young

If you plan to attend, please register at: https://momtomomlunch.com.

Registration will open on Saturday, February 15, 2020.

Limited childcare will be available (registration is required for all children).

Childcare will open at 1:30 p.m. the day of the event.

For additional information or questions, please contact Elyse Fisler at momtomomlunch@gmail.com or at 717-512-7249.