



Hosts

Protecting Your Family's Future

Date and Time: Saturday, June 29, 2019, 10am to noon

Location: TACT, 2733 W. 8th Ave, Denver CO 80204

RSVP for parents: Betty@LehmanDP.com

With RSVP only – TACT offers fun activities for your children while you attend!

RSVP for your child: Becky Mershon, (303) 815-3206, becky@buildwithtact.org

Steven R. Owens, JD, Attorney and Counsellor at Law

Steve practices extensively in Special Needs Planning. His presentations are “informative and entertaining”. Steve will cover the legal challenges and protections that all families with special needs considerations must deal with, including how to work through emotional difficulties about planning and available legal tools. Steve understands the challenges to ensure proper protections are in place, which is why he offers his time and talent for community presentations. Steve explains how to:

- *Identify the dangers* facing your child and your estate plan, and *how to deal with them*
- How to leave your special child and other heirs what you want, when you want, and the way you want!
- How to maintain *control* of your legacy and provide a true legacy for your other children
- *Avoid estate and income taxes* on your legacy
- Ensure your child's continued eligibility for public benefit programs
- Protect your family's inheritances *from predators, creditors, and denial of medical assistance*
- Why new laws make good planning more important than ever

Melissa J. Edelman, CLU, ChSNC, CLTC is a financial advisor and Chartered Special Needs Consultant.

She has been in the financial services industry for nearly thirty years. She helps families of children with disabilities plan for their future by helping them develop a vision and action plan. Melissa is a parent of three children, one with disabilities. www.SpecialNeedsPlanningPartners.com

Learn strategies designed to help reach the best outcomes:

- How much will we need to be prepared to “leave behind”?
- Is an ABLE account the way to go? May we have an educational account or 529 for them?
- What if I don't yet know if my child will need assistance in the future?
- How can I plan for retirement with a family member with special needs?

Betty Lehman, Disability Advisor, enriches families' understanding of lifetime navigation and how private and public resources impact planning for their lifetimes. Betty provides direction and supports development of the family's Special Directions document. She has been a statewide disability advocate and leader for over thirty years. Betty spearheaded over 14 state statutes in Colorado which resulted in more than \$400 million annually for funding for people with disabilities. Betty shares strategies essential to her own successful planning outcomes for her son Eli. www.lehmandp.com

- How to plan for successors who have your child's best interests at heart
- How to build natural supports for now and the future
- Public benefit options; SSI, SSDI and Medicaid Waivers
- Purposeful planning through *Special Directions*©

Melissa Edelman is a registered representative of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC, Member SIPC. OSI: 4600 S. Ulster St. Suite 1200, Denver, CO 80237 (303)692-8183.