



Four Organizations Come Together To Present

“A Working Lunch On 11th Hour Planning” Tuesday, October 25, 2016

PASQUALE’S RESTAURANT
Mediterranean Room
31555 Woodward Avenue, Royal Oak, MI 48073
(Near 12 Mile Road)
Panel Discussion

Nelson L. Finley, CPA, Certified Public Accountant
Will share information on gifting, step up basis issues and deductions.

Christopher J. Berry, CELA, Elder Care and Estate Planning Attorney
Will discuss various elder care and estate planning issues to include Medicaid basic, Veteran’s benefits, durable power of attorney issues, patient advocate issues, HIPAA considerations, will and trusts review, funeral representative and electronic data laws.

Terry R. Altman, CFP®, CLU, ChFC, Insurance Professional
Will discuss inventory of existing coverage, beneficiary review and considerations, rider analysis for liquidity, hybrid coverage and long term care issues and triggers, cash value considerations and short and long term disability.

Sandra D. Adams, CFP®, Financial Planner
Will discuss titling considerations, required minimum distributions pre-death, asset allocation for liquidity, and disposition of real assets.

AGENDA:	10:30 a.m.	Registration Window Opens & Optional Networking Time
	11:20 a.m.	Buffet Dining
	11:30 a.m. – 12:30 p.m.	Presentation – Q&A

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*Log onto our website by October 18 to make your reservation and pay with VISA or Master Card.*  
[www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY October 18 TO: **COST: \$10.00 PER PERSON**  
FPCMD • 33006 W. Seven Mile Road, #237 • Livonia, MI 48152  
Phone: (313) 530-9223 • Fax: (248) 479-0350

MEMBER NAME: \_\_\_\_\_ COMPANY NAME: \_\_\_\_\_  
GUEST NAME: \_\_\_\_\_ TOTAL ENCLOSED: \_\_\_\_\_