



SURVEY

Eileen Voigt from Thrivent is happy to provide financial education to our congregation. For the older members, here are the workshops she suggests. We will conduct a survey to see which of the three have the most interest and then schedule a workshop this Fall.

Please check the boxes you have an interest participating in.

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Preparing Wisely: Estate Strategy Essentials - This workshop explores how having a strategy in place can make things easier for your family after you're gone. Attendees will learn what documents they need so final wishes are known. There is a booklet handout for participants to fill in for their families.

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11 Flags to Spot Scams—This workshop helps attendees explore the scam epidemic in our country and red flags that might be clues for scams.

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Taxes and the "Widow's Penalty" - The phrase "widow's penalty" describes the circumstance when someone pays more in taxes after their spouse dies. It happens when a widow or widower making the same or slightly less income is required to pay more income taxes. The so-called penalty is surprisingly common and can also affect Social Security benefits and Medicare premiums. This workshop offers practical planning tools to help minimize or eliminate the penalty. This workshop is helpful for married couples, but not helpful for a single individual.

Name _____

Phone # _____

Please return your survey to Aimee in the Church Office by August 31st.