



FINANCIAL JOURNEY
PARTNERS

ESTATE PLANNING SEMINAR

Please join Elaine, Scott, & Linda for this exclusive Estate Planning Seminar with Guest Speaker, Attorney Kelly McHaffie



We will answer common questions that include:

- How do I specify the health care at the end of life for myself or my parents?
- How does the Estate Tax work?
- What is probate and how does it work?
- How should I select beneficiaries for my accounts?
- For my 401k, is it better to list my kids or my trust as the beneficiaries?
- How does a Beneficiary IRA work?
- What is the difference between a will and a trust?
- How do I get a living trust?
- Tracking your goals

WHEN:

Thursday, May 9, 2019
5:00pm – Dinner
6:00pm – Seminar

LOCATION:

101 Metro Drive, Suite 264
San Jose, CA 95110

This is a free event; you are welcome to invite guests!

RSVP to Arielle at arielle@financialjourney.com or 408.963.2889

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