

Estate Planning Information

for

UAW Local 5960 Members Retired or Active

A Special Retiree Workshop has been arranged for members and their spouse

Thursday, January 13, 10:00am

UAW Local 5960 Hall in Lake Orion

Coffee, doughnuts, and registration: 9:30am – 10:00am

The presenters listed below will cover several topics including the following:

- Need for Estate Planning
- Steps in the Estate Planning Process
- Duties of the Personal Representative
- Avoiding Probate
- Types of Wills and Trusts
- Power of Attorney
- Long Term Care & Medicaid
- New Beneficiary Rules for IRA and 401k

Ted Lakkides, CFP® • Financial Freedom House – a fee-based and fiduciary investment firm
Matthew Anderton • Attorney who specializes in estate planning, trusts, wills, and probate
Darwin Moore • Financial Freedom House – a fee-based and fiduciary investment firm

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Financial Freedom House ("FFH") is a federally registered and CEFEX-certified Investment Adviser. The seminar is designed to provide general information on the subjects covered. It is not, however, intended to provide specific investment, legal, or tax advice.

-----3 WAYS TO REGISTER-----

(1) Complete this form and return to UAW Local 5960.

(2) Visit www.FinancialFreedomHouse.com and click Events.

(3) Call (248) 673 – 2900

NAME	PHONE NUMBER
ADDRESS	
YOUR EMAIL	WILL YOUR SPOUSE ATTEND? YES NO

5960 1/13/22