

Join us for

SPECIAL NEEDS TRUSTS

1.0 CPE CREDIT

Provided by Approved Program Sponsor

State Board of Accountancy - Bureau of Professional and Occupational Affairs

SPEAKER



James A. Ritter, Esq.

Jim concentrates his practice in the areas of estate planning and administration. In many cases, Jim has counseled his clients and their families for multiple generations, keeping them up-to-date on new estate laws and offering the comfort of knowing that they are prepared for the future.

The purpose of a Special Needs Trust is to preserve public benefits for the trust beneficiary while supplementing the beneficiary's lifestyle with private funds. It is important to understand the qualifications of this legal option and other trust options and their potential benefits.

Join us for the one-hour CPE credit seminar presented by experienced attorney Jim Ritter as he provides a primer on government benefits including SSI, medical assistance, and more. The presentation will then dive into Pennsylvania's Special Needs Trust options including Third Party Special Needs Trust and Self-Settled Special Needs Trust. Jim will cover the legal requirements of each, and how they could potentially benefit your client in planning for their family's future.

Wednesday, December 6

OFFICES OF GROSS MCGINLEY, LLP
33 S. 7th Street, Allentown, PA
FREE PARKING

7:45am Registration
8:00am to 9:00am Program

CPE Information

Basic Level

No Prerequisites

Subject: Specialized
Knowledge and
Applications

We are offering this seminar free of charge. However, space is limited.

Please complete and return the attached Registration Form by **Wednesday, November 29th** to Maddy Miller by fax to (610) 820-6006 or by email to mmiller@grossmginley.com.

For more information, please call (610) 820-5450.



Registration Form

SPECIAL NEEDS TRUSTS

12.6.17

NAME: _____

TITLE: _____

COMPANY: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

- Please add my email address to your mailing list
for future seminars and legal updates.

Please fax/email/mail before **Wednesday, November 29th** to:

Maddy Miller, Director of Business Development & Marketing

Gross McGinley, LLP

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