

*Join us for*

## **ESTATE PLANNING FOR PARENTS OF MILLENNIALS**

### **1.0 CPE CREDIT**

Provided by Approved Program Sponsor

*State Board of Accountancy - Bureau of Professional and Occupational Affairs*

#### **SPEAKERS**



**James A. Ritter, Esq.**  
Gross McGinley, LLP



**Andrew Werner, CPA**  
Werner & Co. CPAs



**Jeff McElhaney, Jr., CFP®, AAMS®**  
Edward Jones Investments

Formerly known as “Baby Boomers”, 50-65 year-old clients are now being referred to affectionately as the “Sandwich Generation”. People in this age range are flanked by elderly parents and young adult children, each of whom require specific financial needs. Managing aging parents who are entering nursing homes and care facilities requires specific financial arrangements that can be difficult to address with elderly family members. Parenting young adults in the “Millennial” generation comes with its own dilemma, ensuring that they are financially stable and prepared when their parents wish to start taking advantage of transferring assets.

This one-hour CPE credit panel discussion will specifically address the estate planning and financial needs of 50-65-year olds from the perspective of an attorney, accountant, and financial planner. The discussion will focus on how accountants and financial planners can ensure they are providing their clients with appropriate guidance.

**Tuesday, May 22**

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

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

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

Please complete and return the attached Registration Form by **Tuesday, May 8th** to Maddy Miller by fax to (610) 820-6006 or by email to [mmiller@grossmcginley.com](mailto:mmiller@grossmcginley.com).

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

#### **CPE Information:**

Basic Level; No Prerequisites; Subject: Specialized; Knowledge and Applications