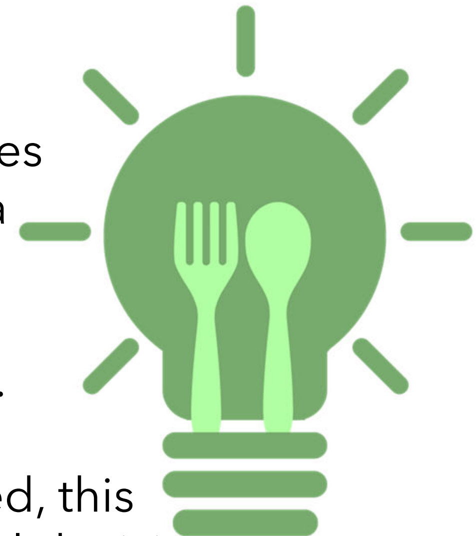
Lunch & Learn Financial Planning Series

Legacy Giving: *Leading your legacy with stewardship & purpose*

WHY ATTEND?

- Maximize tax-savings opportunities under current tax law with these informational, no-obligation learning seminars.



- Gain timely financial insights, ask questions, and learn strategies that can help to protect your assets, reduce taxes, and create a lasting legacy.
- Ensure your estate plan reflects your current wishes and goals.
- Whether you're updating an existing plan or just getting started, this seminar series will provide the tools to make informed financial decisions
- Lunch provided

WHAT YOU'LL LEARN

✓ The importance of intentional financial planning

✓ Aligning investments with personal values

✓ How thoughtful planning can support your family and causes you care about

✓ Explore tax-efficient estate and charitable planning strategies

August 6 Thursday
11:30am – 1:00pm
Coleman Auditorium
Clubhouse

TOPIC: Gifts That Give Back-Smart Ways to Support What Matters Most to You

Featuring
Elyse Kauffman from Everence Financial who will discuss Charitable Gift Annuities & Donor-Advised Funds.

September 10 Thursday
11:30am – 1:00pm
Coleman Auditorium
Clubhouse

TOPIC: Faith-Based Investing

Featuring
Michele Dombach from Coram Deo Advisors, financial advisors committed to helping individuals and families lead their legacy through faithful stewardship.

September 22 Tuesday
11:30am – 1:00pm
Coleman Auditorium
Clubhouse

TOPIC: Elder Law

Featuring
Marcie Miller from Gibble-Kraybill & Hess, which specializes in elder law, estate administration & planning, preservation of assets.

REGISTER FOR ONE, TWO OR ALL THREE SESSIONS

Go to the EVENTS section and find the date to register
For more information, email tstickler@cornwallmanor or call 717.675.1511