

Educational Seminar

Practical Financial and Estate Planning for Special Needs Families



Sponsored by the San Jose Public Library and the:



Saturday, May 8th
11AM–2PM

Willow Glen Branch Library
1157 Minnesota Ave
San Jose, CA 95125

Please reserve your attendance and email your questions to:

specialneedsplan@gmail.com
408-218-6563

Free of cost. Attendance is adults only due to space limitations.

Life can be complicated. Raising and caring for special needs family members can be challenging. Fortunately there are practical steps you can take to build a stronger financial and estate plan for your family. This seminar will cover estate planning techniques such as: naming guardians for minor children, planning for money gifted or expected as inheritance for a special needs child and conservatorship of special needs individuals. Financial topics include “Five Factors Affecting Special Needs Planning” , “The Comprehensive Family Plan” along with tools and resources.



Ann Marshall Robbeloth, Attorney at Law



Oskar Vierny, Certified Financial Planner