The Need
If dealt with beforehand, Estate Planning can help alleviate the burdens of all the legal issues that may arise after your death.

The Best Audiences for this Workshop
All Levels of Staff

The Objectives of this Workshop
1. Learn about the Financial Planning Pyramid
2. Go over the basics of the Estate Planning
3. Discuss Expense Planning

The Workshop Agenda
I. What is the Financial Planning Pyramid?

II. Insurance

III. Available Cash Assets
   A. Emergency Fund
   B. Savings

IV. Estate Planning
   A. Plan for Preservation
   B. Plan for Distribution
   C. Problems that may arise at death

V. Wills
   A. Probate Process
   B. Trusts
   C. Power of Attorney

VI. Advanced Medical Directives
   A. Nursing Home Costs

VII. Next Step