

COMMUNITY INSIGHTS

Family round tables to help you understand your planning options

Community Insights are family round tables offered to the community free of charge to help families in the areas of estate, financial, business, real estate as well as long-term care planning. Community Insights are designed to introduce you to the various planning options that facilitate achieving your goals. You will benefit from being included in programming that keeps you abreast of the various alternatives in today's marketplace.



California Estate and Elder Law and Foundation for Senior Care Invite you to attend:

Tuesday, July 10 from 12:00—1:30 PM

Why Most Estate Plans Fail – When the Diagnosis is Dementia

Tuesday, September 11 from 12:00—1:30 PM

The 3 Lies and 8 Mistakes of Medi-Cal and Elder Law Planning

Tuesday, November 13 from 12:00—1:30 PM

Getting Your Legal Affairs in Order in a Changed World – Pitfalls and Options

Location: Christ the King Church Fireside Rm, 1620 S Stage Coach Ln, Fallbrook

Lunch will be provided!

To Register please go to www.SCInstitute.org/FSCC

Or call 760-723-7570



CALIFORNIA
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COMMUNITY INSIGHTS

with



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**Located at Christ the King Church Fireside Room
1620 S Stage Coach Ln, Fallbrook, CA 92028**

Topic Summaries

Why Most Estate Plans Fail – When the Diagnosis is Dementia *July 10*

Presented by Scott Stewart, Esq.

Wills, trusts, and other estate planning documents have been traditionally drafted to solve for the moments before death and the years after death. These documents address the proverbial end as if it's a light switch. Learn how your planning and documents can address the full spectrum of planning – everything that may happen between now and then in the areas of control, health, safety, finances, and estate preservation.

The 3 Lies and 8 Mistakes of Medi-Cal and Elder Law Planning *Sept 11*

Presented by Scott Stewart, Esq.

Confronting the costs of long-term care is often the largest expense a couple will face. Families often believe that it is too late or early to plan - and they must bear these costs on their own. Though this may have been true 10 or 20 years ago, that is not the law now. We know that families often feel overwhelmed and are relieved to find a path to working through it all. Learn how to overcome these 3 lies and 8 mistakes as well as understanding your current options.

Getting Your Legal Affairs in Order in a Changed World – Pitfalls and Options

Nov 13; Presented by Scott Stewart, Esq.

Effective planning is as much or more about preserving family relationships as it is about preserving family assets. Most estate plans will fail to preserve the family relationships and will also fail to take advantage of the changes in the law. Join us to review: protections and control for the surviving spouse; today's disability planning pitfalls and options; as well as your trustee's rights, responsibilities, and liabilities. Estate planning and settlement isn't about a rote distribution of assets. It's about caring for and supporting the relationships embedded in the plan.

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