SENIOR CONCERN SEMINARS

Round tables to help you understand your planning options

Senior Concern Seminars 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. Senior Concern Seminars 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. We will also be offering complimentary consultations, so if you are interested in scheduling time, please reach out to the Foundation for Senior Care.

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

Wednesday, February 13 from 12:00—1:30 PM
Why Most Estate Plans Will Not Work Considering the New Tax Law and/or the Likelihood of Disability

Monday, June 10 from 12:00—1:30 PM
Caregiver Economics

Tuesday, August 13 from 12:00—1:30 PM
The 5 Essential Documents

Tuesday, November 12 from 12:00—1:30 PM
Taking the Handcuffs Off the Surviving Spouse

Located at Christ the King Lutheran Church
1620 S. Stagecoach Ln.
Fallbrook, CA 92028

Lunch will be provided!
To Register please go to www.SCInstitute.org/FSC
Or call 760-723-7570

CALIFORNIA ESTATE AND ELDER LAW, LLP

FOUNDATION FOR Senior Care

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Topic Summaries

Why Most Estate Plans Will Not Work Considering the New Tax Law and/or the Likelihood of Disability; Wed., Feb.13, 2019 *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. 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.

Caregiver Economics; Mon., June 11, 2019 *Presented by Scott Stewart, Esq.*
Estate planning used to just be about the avoidance of probate and estate taxes. Now, though these are important topics, estate planning and trusts need to address the inevitable need for long-term care and possible mental disability/dementia. Additionally, personal wealth can be wiped out upon the disability of either of the spouses if the trust and other assets are not properly planned for. Join Scott and Alexis as they review your options on how to pay for care, and more importantly, how to protect your estate, yourself, your loved ones, and your family relationships.

The 5 Essential Documents; Tues., Aug. 13, 2019 *Presented by Scott Stewart, Esq.*
Scott will share what each of the five essential documents in estate planning is designed to do and why they are important for you. Help memorialize your wishes in case of death or incapacity. This is an indispensable presentation on how to get your ducks in a row. You will also learn the different sections of the Advance Health Care Directive as well as walk away with a completed document!

Taking the Handcuffs Off the Surviving Spouse; Tues., Nov. 12, 2019
Presented by Scott Stewart, Esq.
For years, estate planning attorneys have been using A/B trusts primarily to protect their clients against estate taxes (though there are other reasons such as creditor protection and family bloodline protection). Now, however, the majority of Americans are no longer subject to the estate tax – and capital gains taxes are what most of our clients are concerned about. Join Scott for a discussion on B trusts and AB Trusts – are they still the best option, and if not, what can/should you do about it?

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

Or call 760-723-7570