TOPICS
Why Plan? ABLE Accounts Open Q&A
Special Needs Trusts Strategies to Fund a Trust

WHERE: ZOOM, MEETING ID: 859 302 1223

SPECIAL NEEDS PLANNING TEXT "WEBINAR" TO 859-446-5566 TO REGISTER

WHEN: SATURDAY MARCH 13TH 12:00 PM EST TUESDAY MARCH 16TH 12:00 PM EST

Nick Wallace is a financial advisor who specializes helping families across the US in planning for their children with special needs. Nick serves as co-guardian and future trustee for his brother, Aaron.

"As a mom of a child with special health care needs, it was important to find someone who understood our unique situation. Nick continues to be this person for our family. He is easy to talk to, available to answer any questions or concerns, and he’s genuinely invested in what’s best for the families he serves."

-AMY

"For all the special needs parents, I attended one of these, and it started me thinking about things I hadn’t thought of before. Very informative. Nick is a great guy and very knowledgeable and caring about your situation."

-SARAH

"Ken and I attended Nick’s workshop. We learned so much about planning for our children, especially regarding the special needs trust. We had put this off for so long because we were not sure where to start. After learning about our options, we worked along with Nick and a local special needs attorney and are confident our children will be provided for should something unforeseen happen."

-DIANE

"Nick’s expertise on the financial side combined with first hand experience of being a sibling of someone with a disability made our experience outstanding. I would recommend Nick to anyone that is looking to make important and necessary steps securing their loved one’s future."

-MICHELLE

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-DIANE
We had heard the terms “special needs trusts” and “special needs planning” but it seemed overly complex and we were unsure of where to start. After a process of financial planning, legal planning, and family meetings around the kitchen table, we achieved peace of mind knowing that we had done what was in our power to plan the best possible outcome for Aaron’s future.

At the time, I realized that most families, like us, didn’t have access to the information or professional resources necessary to know where to start in planning. Because of this lack of information and resources combined with the fact that these conversations are difficult by nature, many families are unable to complete these important plans for their child’s future.

The purpose of my webinar is to help families overcome the same obstacles that my family faced. Through sharing simplified information, professional resources, and personal experience in my family’s planning, you will leave the webinar feeling in control and with a clear first step for your family’s plan.