Thursday, March 15, 2018
7:30 – 9 pm
Room 210
Newton Education Center
100 Walnut Street
Newton, MA
Financial Planning for Special Needs
Annette Hines, Esq. & Justin Merola, Financial Planner
Annette Hines, Esq. from the Special Needs Law Group and Justin Merola from Merrill Lynch will be joining us to present on how to make the future more secure for your dependent with special needs. Financial and estate planning require additional thought and take on more complexity when special needs are a part of the picture. Our presenters will provide a broad perspective on special needs financial planning, including both legal and financial aspects to consider. They will cover establishing, funding, and managing special needs trusts. They will also discuss the recently-introduced ABLE accounts, which were not available the last time the SEPAC held a presentation on this topic