



First In Families of North Carolina presents...

# Wills & Estate Planning Seminar

## May 3, 2008 9:30-4:00pm

Limited to 15 families

*We want to inspire you to plan for the future.* This seminar is designed to assist 15 families in exploring wills and estate plans backed by a choice structure that supports the individual with a disability. To shape the workshops, a short survey will be sent to participants in advance.

### ***Wills and Estate Planning***

**With:**

Erica Wehner and Walter Sheffield III  
Armor Trust Attorneys  
[www.waltsheffield.com](http://www.waltsheffield.com)

***Explore wills:***

- Specific to the needs of a relative with a disability
- Inclusive of needs of the full family
- Other taxation issues

### ***Financial Vehicles & Funding a Special Needs Trust***

**With:**

Walter Sheffield III  
Armor Investment Advisors, LLC  
*A related service of Armor Trust Attorneys*

***Consider:***

- Funding a Special Needs Trust
- Financial vehicles and trusts
- Family financial planning for the future

### ***Guardianship Options & Ensuring Choice & Safety***

**With:**

Member of Board of Directors  
NC Guardianship Association  
[www.nc-guardian.org](http://www.nc-guardian.org)

***Contemplate:***

- Full and limited guardianships
- Other options to ensure choice and safety

**About Lifetime Connections:** *Lifetime Connections helps families create safe, secure, quality futures for relatives with any type of disability. Lifetime Connections is a program of First In Families of NC, a not-for-profit organization. Lifetime Connections co-presenters are family members of relatives with disabilities, and leaders in advocacy for individuals with disabilities. They will give a short presentation with each session.*

*All presenters have donated their time and expertise.*

**TIME:** 9:30-4:00 pm

**PLACE:** Alamance Community College,  
Burlington (directions to follow)

**COST:** \$75 (*Free to Lifetime Members*)

**BONUS:**

Those attending also receive:

“Peace of Mind”, cd-rom by PLAN Institute

[www.plan.ca](http://www.plan.ca)

based on the book, A Good Life by

Al Etmanski

*and*

1 year Lifetime Connections Associate  
Membership.

**(Lunch included)**

### ***Registration Deadline 4/28/08***

\$75 per family – (2 people max) \$\_\_\_\_\_

Less 10% (For current Associate Members): - \$\_\_\_\_\_

Total people registering: #\_\_\_\_\_ Total \$\_\_\_\_\_

**Name(s)** \_\_\_\_\_

**Email** \_\_\_\_\_

**Fax** \_\_\_\_\_

**Phone** (\_\_\_\_\_) \_\_\_\_\_

Please complete above information for advance survey.

**Address** \_\_\_\_\_

**City** \_\_\_\_\_ **ST** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Payable to FIFNC. Send to address below Or register and pay online [www.fifnc.org](http://www.fifnc.org)**

First In Families of NC, 524 S. Duke St. Durham, NC 27701 [www.fifnc.org](http://www.fifnc.org) 919-768-4938 [gdupre@fifnc.org](mailto:gdupre@fifnc.org)  
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