

Jamestown Special Education Local Advisory Committee

PLEASE POST/DISTRIBUTE

SELAC AGENDA

Tuesday, May 12, 2009 6:30-8:30 p.m.

(Melrose Multipurpose Room)

6:30 – 8:30 PM:

SPECIAL PRESENTATION BY CYNTHIA HADDAD**

(flyer below)

****This special presentation is in lieu of our business meeting for May. Our next regularly scheduled business meeting will be on Tuesday, June 9 @6:30 p.m.**

Special Needs Financial Planning – Demystified!

Cynthia R. Haddad, CFP®, co-author of “The Special Needs Planning

Guide: How to Prepare for Every Stage of Your Child's Life" (Brookes Publishing Co.) will be our guest speaker for the evening.

Her presentation will provide an overview of the key planning points that families should be mindful of in planning for the future of their child to be a productive and active member of our community based upon his or her abilities – both during the lifetime of the parent and upon their death.

Cindy will demystify various financial and estate planning tools and strategies including special needs trusts, guardianship and less restrictive alternatives, life insurance, funding a trust, residential options, protecting Government benefits, the Letter of Intent and more.

Special Needs Financial Planning Demystified for Families!

Presented by:

Cynthia R. Haddad, CFP®

Sibling & Advocate

Well known speaker and co-author of

The Special Needs Planning Guide: How to Prepare for Every Stage of Your Child's Life

(Paul H. Brookes Publishing Co., April 2007)

Date & Location: Tuesday, May 12, 2009, 6:30-8:30 p.m.

Melrose School Multipurpose Room

76 Melrose Ave., Jamestown, RI

Hosted by Jamestown Special Education Local Advisory Committee (SELAC) **

v Taking the first steps towards securing your child's financial future

v Understanding The Five Factors™ in Special Needs Planning - Family & Support, Emotional, Financial, Legal and Government Benefits

v Simplifying the complexities of planning for two generations

Affiliated with Bay Financial Associates LLC in Waltham, MA, Cindy offers comprehensive financial planning through Special Needs Financial Planning LLC. She is a registered representative with, and securities are offered through, LPL Financial, member FINRA/SIPC, Waltham, MA.

www.specialneedsplanning.com

**** Presentation is free and open to the public. Pre-registration is required by Thursday, May 7. For more information or to register, please contact Jill Ball, Jamestown SELAC Chair, at jball44@cox.net or 560-0375.**