



DIRECTIONS

- US 35 to Progress Drive
- South on Progress, passing Walmart and Lowes
 - East on Second Street
- Xenia Community Center (XCC) will be on the South Side, with parking and entrance in rear
- XCC is a former school building and is across from the Xenia Nazarene Church



If you have questions or need more information, please call or e-mail the Greene County Council on Aging at 937-376-5486/info@gccoa.org



***It is never too soon
or late to plan!***



Greene County Council on Aging Presents:



***It's My Money, My Stuff
and My Life!***

**▶ Estate Planning
For Your Future**



- Taking the First Step
- Assets, Wills, and Advanced Directives
- Recording of Property
- Insurance
- Trusts, Probate & Taxes
- Medicare/Medicaid

October 2, 9, 16, 23, & 30 2018
6:00pm to 8:30pm
Xenia Community Center
1265 W. Second Street—Xenia

▶ **DID YOU KNOW ... ?**

- If you don't have a will, the state of Ohio will decide where your assets will go.
- Forty percent of American adults have a will or living trust.
- Very few Americans have enough saved for retirement.
- Very few individuals actually benefit from a trust.
- Medicare pays for little or no home-care.
- There may not be "his, hers and mine" when dealing with Medicaid rules.
- Life insurance proceeds may not go through probate.
- More 'adults' are working longer or going back to work.

Program Purpose

Planning for our future is more complicated than ever. This five-week course provides an opportunity to start or continue your planning. No matter your age or level of financial resources, this course will jump-start your plan!

We cannot plan for every "what if", but we can educate ourselves and make important decisions that will give us some peace of mind & answer nagging questions such as:

- If I don't have much other than a car, house and monthly income, what kind of planning can I really do?
- My kids are financially struggling. Should I help them?
- Will settling my estate be a burden for my family?
- How should my property be titled?
- Should I update my will and other documents?
- Will insurance cover nursing home care?
- If I leave a young family, will their future be secure?

This program is presented with the cooperation of local professionals volunteering their time and expertise so we can all have the needed tools to plan for our future and the future of our families.



Sessions

October 2

Taking the First Step

Jerry Mahan, Retired Extension Educator

Pitfalls in Planning

Pete Stephan, Attorney

October 9

Titling of Assets, Wills, & Advanced Directives

David Peterson, Attorney

October 16

How Does Insurance Fit In?

Matthew Bennett & Justin McColaugh
Anderson-Williamson Insurance Agency

Property and the Recorder's Office

Eric Sears & Tammy Cox
Greene County Recorder's Office

October 23

Trusts, Probate & Taxes

Dave Cusack, Attorney

October 30

Medicare/Medicaid and Other Retirement Health Insurance & Services/Support for Seniors and Caregivers

Susan Allen & Karen Puterbaugh, GCCOA

Registration Information

Cost ~ \$40 per household, includes binder and all program materials. Refreshments will be provided.

Please complete the enclosed registration form and send with payment payable to GCCOA, **by September 24th.**

**Greene County Council on Aging
1195 West Second Street
Xenia, Ohio 45385**

