

FREE EDUCATIONAL SEMINAR

THE MISSING PIECES: PLANNING TODAY FOR YOUR FAMILY'S FUTURE

When your estate planning attorney, financial planner, and trust company operate independently, important details can be missed when your loved ones most need clarity.

Join us for a seminar that turns separate strategies into a coordinated plan your family can count on.

TUESDAY, JUNE 2, 9 – 10 AM

7733 Forsyth Blvd., Clayton, MO 63105

(complimentary validated garage parking at address)

Seminar

OVERVIEW

There are many considerations when planning for the future of your family. Proper estate planning documents and financial planning are key pieces of the puzzle, but important questions often remain. What if your family members aren't good with money? What if you don't want to burden a family member with these jobs? Should a professional trust company be part of your plan to manage assets in the future?

Discussion

INSIGHTS

Our speakers have coordinated a real-world case study that walks through how an estate plan, financial plan, and trust company work together to support your needs and wishes for the future.

Attendees will learn:

- What can go wrong when these pieces are not aligned
- When it makes sense to involve professionals
- How to reduce the burden placed on your family members
- How to build a plan that functions clearly when it matters most

Meet our PRESENTERS



Tabitha Atwell

Estate Planning Attorney,
Danna McKittrick, P.C.



Megan Burke

Financial Advisor,
Edward Jones



Rebecca James

Trust Advisor,
Parkside Financial

Register online at dannamckitrick.com/seminars

The choice of a lawyer is an important decision and should not be based solely upon advertisements.