ABLE ACCOUNTS

and Special Needs Trusts

What Can ABLE Accomplish?

Join us for a presentation on ***Special Needs Financial Planning*** to discuss the new 529 ABLE accounts that are expected to be available this year, special needs trusts (SNTs), and how these tools interact with one another.

You will learn:

- What a 529 ABLE (Achieving a Better Life Experience Act) savings account is, and how it measures up to an SNT.
- How an individual may use both an ABLE account and an SNT.
- How Wisconsin residents may open an ABLE account in another state.
- How ABLE accounts may contribute to comprehensive special needs planning.
- The role of professional advice in a comprehensive special needs plan.

Presenters:

Kathleen Oberneder Betty Wellhoefer Hill MBA, CFP® Crescendo Wealth Management	Jessica Liebau Attorney Willms SC

Date/Time: Wednesday May 18th, 2016 @ 6pm

Place: **Balance, Inc. 1350 14th Avenue Grafton, WI 53024**

CRESCENDO Wealth Management LLC

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