

SPECIAL NEEDS PLANNING



NICK WALLACE

Nick Wallace is a financial advisor who specializes in helping families across the US in planning for their children with special needs. Nick serves as co-guardian and future trustee for his brother, Aaron.



ANNIE WARNER

Annie K.T. Warner is a Special Needs Planning Attorney licensed in Ohio and Kentucky. For the last ten years Annie has assisted hundreds of clients with Special Needs Trusts, Guardianships, Settlement Planning and Government Benefit issues. She founded Anchor For Special Needs Inc., a pooled special needs trust serving the disabled community and continues to work closely with organizations that provide resources and enrichment to individuals with special needs.

JOIN US

TOPICS

- Special Needs Trusts
- Strategies to Fund a Trust
- ABLE Accounts
- Guardianship
- Open Q&A

WHEN: TUESDAY, JULY 28TH
6PM EST

WHERE: ZOOM, MEETING ID:
841 5522 0166

WHO: OHIO RESIDENTS INTERESTED
IN SPECIAL NEEDS PLANNING

PLEASE TEXT 859-353-2459 TO RSVP