



B&L Financial Architects

Designers of solid financial futures.

*Workshop Series for
Long Term Care Planning*

**What would happen to those you love if they needed to take care of YOU?
Will you have the option of remaining in your home as your abilities change?
Will your retirement plan withstand large expenses for care?**

We all desire to be in the driver's seat when it comes to planning for our future. A crucial component to a successful retirement strategy is having a plan in place today that will prepare for the great possibility of needing care in the future.

To help you do your homework, Jacqueline Clark, CLTC has brought together a team of professionals with experience in a range of strategic long-term care planning topics in this workshop series. We invite you to attend the following FREE informational sessions to gain valuable insight regarding important long-term care topics.

For all of the following sessions, reservations are requested.

Please RSVP to Jacqueline Clark at jclark@blfinarc.com or (860) 432-9119 x357.

What is the Medicare donut hole and is there anything I can do to avoid it?



Date: April 5, 2018, 6:00 p.m.

Bolton Public Library, 206 Bolton Center Road, Bolton, CT 06043

RSVP by April 3rd jclark@blfinarc.com or (860) 432-9119 x357

Guest Speaker: Judy Montigny, Financial Professional

Signing up for Medicare can be a daunting task! Judy will share insights to help navigate the intricate work of Medicare. Judy focusses on helping retirees choose an appropriate Medicare plan options including evaluating your current doctors and medications. We will also clear up the facts surrounding what costs associated with long-term care Medicare will and will not cover.



www.blfinarc.com

Judy Montigny is not affiliated with or endorsed by the Social Security Administration, the Centers for Medicare & Medicaid Services, or any governmental agency.

I want to stay in my home forever. Who will be there for me when I need help?



Heaven's HANDS
Home Care Agency

Date: April 19, 2018, 6:00 p.m.

B & L Financial Architects, 85 Felt Road, Suite 601, South Windsor, CT 06074
RSVP by April 17th jclark@blfinarc.com or (860) 432-9119 x357

Guest Speaker: Shantel Duah, Heaven's Hands Home Care

We may find ourselves or a loved one needing help from others with daily activities. There is an ever growing array of community and home care services available allowing you to remain in the comfort of your home.

We will share from soup to nuts how these flexible services may be coordinated to help maintain independence and lessen family care giving strains.

How do I make sure my wishes are carried out while I am living and after I am gone?



Goldman Schwartz, LLC
www.familytrustmatters.com

Date: May 10, 2018, 6:00 p.m.

B'nai Tikvoh Sholom, 180 Still Road, Bloomfield, CT 06002
RSVP by May 8th jclark@blfinarc.com or (860) 432-9119 x357

Guest Speaker: Elder Law Attorney Renee Schwartz, Goldman Schwartz, LLC

It is crucial to prepare today for a secure tomorrow. Learn how to protect what you have for the people in your life that you love the most. We will cover topics such as the use of trusts to protect assets, the importance of having current health directives, power of attorney, and more.

How do I turn my home into a "Livable Home" for today and tomorrow?



BA Bullock Access
Accessibility Products and Services

www.bullockaccess.com

Date: May 23, 2018, 6:00 p.m.

Bullock Access, 100 Pitkin Street, Suite E, East Hartford, CT 06108
RSVP by May 16th jclark@blfinarc.com or (860) 432-9119 x357

Guest Speakers: Amie Bullock & Cliff Bullock, Bullock Access

Building a new home or remodeling your existing home? Incorporating accessible design features into your home is a revolutionary solution that ultimately creates a "livable home" for everyone. Learn about barrier-free showers, residential elevators, stair lifts and other accessibility products offered through Bullock Access. We will also share tips for simple low-cost modifications such as converting hardware and adding strategic lighting that will create a home that accommodates everyone – today and in the future. Amie, Cliff and Jackie will share valuable ideas that you will want to consider for your home. The Bullock Access showroom features demonstration products for a hands-on experience.

Are you prepared to close the income gap?



MEDALLION
WEALTH ADVISORS LLC
www.medallionwealth.com

Date: June 6, 2018, 6:00 p.m.

Elmwood Community Center, 1106 New Britain Ave, West Hartford, CT 06110
RSVP by April 30th jclark@blfinarc.com or (860) 432-9119 x357

Guest Speaker: Matthew Woods Weber, CFP, Medallion Wealth Advisors, LLC

You have been preparing for a comfortable retirement making sure you have enough savings and income to do all of the things you have been dreaming of. Would you be worried if you had to find an additional \$50,000 or more per year to cover long-term care expenses? Find out how to close the income gap and protect your legacy.



Jacqueline Clark, CLTC

Jackie's personal experience with her own parents sparked her passion to help clients put a plan in place that protects their families from the emotional, physical and financial devastation that extended care can cause. Jackie collaborates with families to create a well-designed comprehensive quality of life plan. Jackie guides her clients through what decisions must be made well before care is needed; planning includes where and by whom will care be provided, what services are available within the community and how much the services will cost. Jackie then counsels regarding an efficient manner of funding the plan.

Jackie began her career in the financial services industry in 1986. She has been awarded the CLTC® Certification for Long-Term Care professional degree. The CLTC designation has been recognized and supported by The American College, NAIFA and major insurance carriers. She is certified to sell long-term care insurance approved by the Connecticut Partnership for Long-Term Care.

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