The How & Why of Estate Planning

ABOUT THIS WEBINAR

Estate planning may be one of the most important and overlooked aspects of caregiving. When a proper estate plan is not in place, individuals and families may face a variety of issues affecting finance, housing, benefits, and services, among others. This webinar, designed for service providers and caregivers alike, highlights the importance of estate planning and focuses on plans that involve individuals with special needs. Join this interactive session to examine government programs designed for individuals with special needs, basic estate planning documents, first-party and third-party special needs trusts, general considerations for selecting fiduciaries, and other related topics.

Learning Objectives:

1. Develop a greater appreciation for the benefits of estate planning and the critical need for such plans in families with special needs.
2. Define the role that special needs trusts and ABLE accounts play in a special needs estate plan.
3. Identify tips for selecting an appropriate trustee, transferring assets to the trust, spending funds from the trust, and dealing with common trust administration issues.
4. Review strategies to protect eligibility for needs-based government benefits while providing supplemental funds to enhance the quality of life for an individual with special needs.

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CONTINUING EDUCATION

- Social Work, LPC, LMFT: Programming approval for 1.5 CE credits will be obtained for Social Work, Licensed Professional Counselors, and Licensed Marriage & Family Therapists from the University of Texas at Austin, Steve Hicks School of Social Work.
- Case Manager: This program has been submitted to the Commission for Case Manager Certification for approval to provide board certified case managers with 1.5 clock hours.
- Board Certified Patient Advocates: This program has been pre-approved by The Patient Advocate Certification Board to provide continuing education credit to Board Certified Patient Advocates (BCPA). The course has been approved for a total of 1.5 CE contact hour, of which 0.0 are in the area of Ethics.
- Certified in Family & Consumer Sciences (CFCS): This program is currently seeking approval of 1.5 CE credits from the American Association for Family and Consumer Sciences (AAFCS) for CFCS.
- Certified Personal Finance Educator (CPFE): This program is currently seeking approval of 1.5 CE credits from the American Association for Family and Consumer Sciences (AAFCS) for CPFE.
- Accredited Financial Counselors (AFC): This webinar has been approved for 1.5 CE credit.
- Certified Personal Financial Counselors (CPFC): This webinar has been approved for 1.5 CE credit.
- Certificates of Attendance are available for providers interested in documenting their training activities.

PRESENTER

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