



Let's start a conversation...

Join us for an informal, roundtable conversation about financial and estate issues that concern families and their children with special needs and what they might want to consider in planning and protecting their loved ones. Chat with other parents and/or family members who are dealing with some of the same challenges.

CONVERSATION SERIES

6:30-8:00 PM @ **Kent Phoenix Academy**
11000 SE 264th Street, Kent, WA 98030

January 23, 2018 — Guardianship & Related Financial Concerns

February 13, 2018 — Durable Power of Attorney / Finances 101

March 20, 2018 — Creating a Trust & Financial Strategies for a Person Centered Plan

If you would like to schedule a meeting rather than attend a group session, please contact Sheldon Sweeney at 425-641-8788 x257 or ssweeney@pcrg.com

JOINING THE CONVERSATION



Sheldon Sweeney, Financial Adviser and Leader of the PCRG Special Needs Resource

At PCRG, Sheldon focuses a significant portion of his practice where he's most connected: **families and their children with special needs**. Sheldon's youngest of five children has Down syndrome and he knows the daily demands on families and the need for high quality planning for the future of all children with special needs.

Sheldon often says that his favorite part of the planning process is witnessing the peace that his clients experience after he's helped them identify their goals and objectives and then provided them with the best strategies to attain those goals.



Diana Zottman, Three60 Law Group, PLLC

Growing up in Seattle with a brother with developmental disabilities (I/DD) shaped much of Diana's thinking and her life goals. As a new lawyer, Diana worked as a public defender for the largest public defense firm in King County. After becoming involved with the Washington State Developmental Disabilities Council, Diana connected with other families who were caring for those with special needs. Diana transitioned her practice to estate planning in 2000 and while helping families through probate, found that many estate plans fail to address the unique elements of the decedent's life. An incomplete or ill-suited plan can lead to significant delay, expense, and even unnecessary conflict. Whether families are facing significant issues or not, an effective and comprehensive estate plan helps families educate, protect, and provide for this and future generations while keeping the probate process organized and efficient.

Questions and to RSVP:

Child care available upon request and by appointment.

Susan Whitehall

Administrator, The Transition Outreach Program (TOP)
 Coordinator of Transition Services, Kent School District
 T: 253-373-4080 | E: susan.whitehall@kent.k12.wa.us