



### DIRECTIONS

- US 35 to Progress Drive
- South on Progress, passing Walmart and Lowes
  - East on Second Street
- Xenia Community Center (XCC) will be on the South Side, with parking and entrance in rear
- XCC is a former school building and is across from the Xenia Nazarene Church



If you have questions or need more information, please call or e-mail the Greene County Council on Aging at 937-376-5486/info@gccoa.org



***It is never too soon  
or late to plan!***



**Greene County Council on  
Aging Presents:**

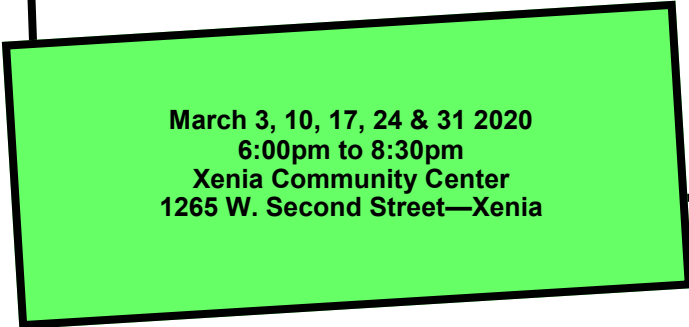


***It's My Money, My Stuff  
and My Life!***

▶ **Estate Planning  
For Your Future**



- Taking the First Step
- Assets, Wills, and Advanced Directives
- Recording of Property
- Insurance
- Trusts, Probate & Taxes
- Medicare/Medicaid



March 3, 10, 17, 24 & 31 2020  
6:00pm to 8:30pm  
Xenia Community Center  
1265 W. Second Street—Xenia

## ► DID YOU KNOW ... ?

- If you don't have a will, the state of Ohio will decide where your assets will go.
- Forty-two percent of American adults have a will or living trust.
- Very few Americans have enough saved for retirement.
- Very few individuals actually benefit from a trust.
- Medicare pays for little or no home-care.
- Life insurance proceeds may not go through probate.
- More 'adults' are working longer or going back to work

## Program Purpose

Planning for our future is more complicated than ever. This five-week course provides an opportunity to start or continue your planning. No matter your age or level of financial resources, this course will jump-start your plan!

We cannot plan for every "what if", but we can educate ourselves and make important decisions that will give us some peace of mind & answer nagging questions such as:

- If I don't have much other than a car, house and monthly income, what kind of planning can I really do?
- My kids are financially struggling. Should I help them?
- Will settling my estate be a burden for my family?
- How should my property be titled?
- Should I update my will and other documents?
- Will insurance cover nursing home care?
- If I leave a young family, will their future be secure?

This program is presented with the cooperation of local professionals volunteering their time and expertise so we can all have the needed tools to plan for our future and the future of our families.

## Sessions

**March 3**

### ***Taking the First Step***

Jerry Mahan, Retired Extension Educator

### ***Pitfalls in Planning***

Pete Stephan, Attorney

**March 10**

### ***Titling of Assets, Wills, & Advanced Directives***

David Peterson, Attorney

**March 17**

### ***Property and the Recorder's Office***

Eric Sears & Tammy Cox

Greene County Recorder's Office

### ***Understanding Annuity and Insurance Products***

Matthew Bennett & Justin McColaugh

Anderson-Williamson Insurance Agency

**March 24**

### ***Trusts, Probate & Taxes***

Dave Cusack, Attorney

**March 31**

### ***Medicare/Medicaid and Other Retirement Health Insurance & Services/Support for Seniors and Caregivers***

Susan Allen & Jeff Schairbaum, GCCOA

## Registration Information

Cost ~ \$40 per household, includes binder and all program materials. Refreshments will be provided.

Please complete the enclosed registration form and send with payment payable to GCCOA, **by February 21st.**

**Greene County Council on Aging**

**1195 West Second Street**

**Xenia, Ohio 45385**