arcare
Planning today for your loved one's tomorrow

True Link

Person-Centered Financial Planning

When helping an individual with disabilities plan for their future, creating a thorough financial plan is essential to beneficiary wellbeing. You may have heard professionals claim they are taking a "holistic approach" to this process – but what does that mean and where do you start?

Join Peter J. Wall, a nationally recognized SNT expert and Director of Fiduciary Services for True Link Financial Advisors, LLC, and Barb Helm, Executive Director of Arcare, Inc., as they discuss how investing and financial planning for individuals with disabilities is distinct from traditional wealth management planning. In this session, discussion topics will include investment strategies and areas that professionals and families should consider when planning, such as tax ramifications, legal planning, government benefits, and more.

June 6, 2022

6:00 P.M.

Central Resource Library
Overland Park, KS
Carmack Room

75 In-Person Seats Only

Virtual Option Also Available

Presenters:

Peter J. Wall
Director of Fiduciary Services
Truelink Financial Advisors

Barbara Helm
Executive Director
Arcare, Inc.

Register For In-Person Session Here

Register For Virtual Session Here

More Info

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