



ESTATE PLANNING SEMINARS



A series of 5 seminars designed for Langley Memorial Hospital staff

- seminar includes handouts and resources relevant to each seminar topic -

HOSTED BY: Lisa Rosales, Donor Relations, Major Gifts and Legacy Giving, Langley Memorial Hospital Foundation

PRESENTED BY: Tanya Lyn Werk, EPC, Financial Consultant, Investors Group

LOCATION AND TIME: LMH Conference Room 5, 6:30 - 8:30pm

1 MAY 23 | A STEP-BY-STEP GUIDE TO WRITING YOUR WILL

Most people know they need a Will, but aren't sure how to get started. Join us for an interactive seminar on how to write your Will and what should be included, what information you will need to gather *before* you create your Will, your financial obligations to family and how to prevent potential problems.

2 JUNE 6 | EXECUTORSHIP AND ESTATE SETTLEMENT

Are you an executor and not clear about your role and responsibilities? Learn about the tasks involved to settle an estate as per the terms of the deceased's Will and according to provincial law, the pros and cons of Joint Tenancy and how to deal with blended families. Better yet - bring the executor of *your* Will so you both understand this important role.

3 SEPT 19 | POWER OF ATTORNEY: What you *need* to know

Are you a Power of Attorney for a loved one? Do you know the types of Power of Attorney and what decisions you can and cannot make? Our comprehensive seminar covers important information about powers that can be granted, choices you need to make to protect both sides and how to avoid commonly-made mistakes.

4 OCT 10 | WOMEN AND MONEY BTW .. Let's talk money.

Now that you've worked hard and built the life you deserve, you want a solid plan to enjoy it. Learn about financial issues unique to women: the impacts of caring for children and aging parents, how to survive separation and divorce plus credit bureau awareness, building and protecting your wealth, and planning for retirement with or without a partner.

5 NOV 7 | A STEP-BY-STEP GUIDE TO WRITING YOUR WILL

Due to this seminar's popularity, we have scheduled a 2nd date in the fall 2017. Join us for an interactive seminar on how to write your Will and what should be included, what information you will need to gather *before* you create your Will, your financial obligations to family and how to prevent potential problems.

SPACE IS LIMITED!

Contact Lisa Rosales to reserve your spot:
(604) 533-6420 or lisa.rosales@fraserhealth.ca

LMHF provides a variety of free financial and estate planning seminars throughout the year. More information at www.lmhfoundation.com



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PRESENTER: Tanya Lyn Werk is a Financial Consultant with her focus on Estate Growth, Protection and Transition. She loves public speaking and leading workshops around B.C. and Alberta for both private and public groups. She joined Investors Group in 2003 and has a total of 20 years of experience in Financial Services. Her offices are right across B.C., including White Rock and Langley. Tanya Lyn holds the International Designation of Elder Planning Counselor. She is also a Registered Retirement Consultant, a Certified Pre-Planning Counselor, has her Diploma in Legal Studies and is currently completing her Certified Financial Planner studies.

