

MANAGING LIFE TRANSITION AND ESTATE PLANNING (434)

Wednesdays, 11:00 – 12:30 (6 Classes 1/31 thru 3/6) in Room 30
Limited to 15

Tuition \$45

When was the last time you reviewed your Estate Plan? How would the loss of your spouse or health affect your retirement? Maintaining dignity in retirement only happens when you have an effective plan in place. Give yourself the security you deserve by attending our interactive Life Transition and Estate Planning Workshop. You will benefit from the discussions about:

- Do I need a Trust: Are there simpler solutions that would work better for me?
- Making the most of your IRA. Recent Distribution Rule Changes may affect your current plan.
- How do I know if I will have enough resources in retirement?
- How can new technology help me stay in my home longer?

Paul Sponseller, CFP® has worked with over a thousand families and individuals in Sun City Center over the past 25 years, specializing in maintaining retirement income, managing life transitions, and developing effective estate planning strategies. He is the author of [20 Great Tax Saving Ideas for your IRA](#) and has been a contributor to Market Watch Retirement Weekly. As a regular lecturer at the Center 4Life Learning, Paul has had hundreds of students attend his Life Transition and Estate Planning courses over the past 14 years.