

THE 2011 ROUNDTABLE SERIES

FOR HEALTHCARE PROFESSIONALS

DATE: TUESDAY, JULY 26, 2011

PRESENTER: Henry Montag and Ron Roel,
Co-Founders/Partners, Financial Forums, Inc.

TOPIC: The Family Meeting

TIME: 12:00 p.m. -2:00 p.m. (arrive by 11:45 a.m.)

PLACE: Puglia's City Café, 987 Stewart Avenue,
Garden City

Henry Montag and Ron Roel of Financial Forum will be co-presenting on the topic of The Family Meeting - a unique approach involving multiple generations of family members in addressing complex personal and financial issues through a collaborative decision-making process.

The issues include the physical and financial aspects of health care; housing transitions; retirement needs; and legacy planning. They will discuss:

- Role(s) of siblings
- The main person in charge of care & financial matters
- Who will the parent live with, if necessary, and where
- When would you want to go to an adult care facility and what triggers it
- Who has powers of attorney and the health care proxy
- Unexpected illness - long term care and other options
- Income and Assets

Henry Montag is an Independent Certified Financial Planner & Certified Long Term Care Specialist who has been in practice since 1976 with offices on Long Island. Ron Roel is a veteran writer and editor who specializes in aging, financial /retirement planning and real estate issues. Financial Forums, Inc., offers professional and consumer seminars, workshops & conferences addressing multi-generational family financial issues.

Reserve Your Place Today
Contact: Susan Tame at 800-680-1717

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