

# *Mathis Financial Corp Invites You to Come and Learn About*

## **WILLS & LIVING TRUSTS**

An Estate Plan is vital for any individual, couple or family that owns a home and has assets. Ensure that your Estate Planning is in good order by reviewing the methods families use to avoid the delays and legal fees of Probate Court. Learn various methods and best practices to protect your family from unnecessary costs and wasted time in Probate.

*You will learn the following topics, in easy to understand terms:*

- The advantages and disadvantages of Wills and Living Trusts
- How Powers of Attorney work and don't work (some may not be valid if you are disabled or pass away)
- How Probate Court works and why you may want to avoid it for your family
- Why putting property in your children's names may be a mistake
- Common missteps by families raising children with challenges, disabilities or special needs
- Protecting your home from being swallowed up by nursing home care
- Protecting your heirs inheritance from lawsuits, divorce and spend-thrifts
- Best practices for naming retirement accounts and Life Insurance beneficiaries
- **HOW THE NEW SECURE ACT AFFECTS YOUR TRUST AND/OR RETIREMENT ACCOUNTS**
- Learn about our "90 in 90 FORMula™" proprietary process

*This seminar is designed to help you and your family avoid the most common costly mistakes.*

Be our guest at this unique and FREE Educational presentation.  
Call our 24-hour reservation line at the number below.

### *Dates, Times & Location*

**Monday**  
March 24, 2025  
2:30 p.m.

**Monday**  
March 24, 2025  
6:00 p.m.

**Wednesday**  
March 26, 2025  
2:30 p.m.

**Wednesday**  
March 26, 2025  
6:00 p.m.

### **SOUTHWEST REGIONAL LIBRARY**

16835 Sheridan Street • Pembroke Pines, FL 33331

Call our reservation line at: **(855) 399-1841** (Toll-Free, 24 Hours)

or

Register online at: **www.youRSVP.com** and enter code: **RXCKZJ**

*For educational purposes only – nothing will be sold at this seminar. This class is not affiliated with Southwest Regional Library and is offered independently of Southwest Regional Library.*