

MATHIS FINANCIAL CORPORATION
CORDIALLY 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.**

We'll cover 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 the **Costs of 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

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 event. If married, spouses are encouraged to attend. Adults only.

❖ *Dates, Times & Location* ❖

Tuesday
August 5th, 2025
2:00 pm

Thursday
August 7th, 2025
2:00 pm

WEST OAKS BRANCH LIBRARY
1821 E Silver Star Rd, Ocoee, FL 34761



SCAN TO RSVP

CALL (407) 608-9243

❖ Meet Your Hosts ❖



Michael W. Morgan

With over a decade of experience in financial services, Michael specializes in helping individuals and families by providing valuable guidance in estate planning, annuities, and health programs. Blending his healthcare expertise with strategic business acumen, he works with families to protect wealth and legacies. Servicing 10 states, he delivers customized financial solutions to each of his clients. In 2023, he and his wife joined Mathis Financial Corp, sharing their commitment to financial security. Michael holds an MBA, a BSN, is a licensed RN, and AHIP-certified in Medicare and health insurance.



Kimkesia Morgan

Kimkesia Morgan is committed to helping families achieve financial security through personalized retirement planning, income protection, and life insurance strategies. In 2023, she and her husband joined Mathis Financial, combining their passion for financial education and independence. With a background as a licensed Realtor and Occupational Therapist, Kimkesia brings a strong service ethic to her financial work, empowering clients to make confident decisions for a secure future.



Mo Dadkhah

Mo Dadkhah is the broker owner of Main Street Real Estate Group and for the last fifteen years has focused his attention primarily on estate planning, real estate, and corporate law. Mo has been named a Top 50 Attorney by the Top 100 Magazine, his Firm has been selected as an Inc. 5000 list of fastest-growing companies, and he has been named as a Chicago Agent Magazine Who's Who for seven consecutive years. He has also been the host of WGN's Market Overdrive radio show.

Mo brings a wide range of knowledge in estate planning, real estate, and corporate law together to best guide his clients on how to best protect themselves.



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**INTEGRATED
TRUST SYSTEMS**
ESTATE PLANNING SINCE 1985

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