



Simply existing is not enough; we also want our family members to have a good life.

-Al Etmanski, Safe and Secure

***Come and join us on September 25th, 2014 and learn more about the Registered Disability Savings Plan and how having a properly executed Will, Trust, and Estate Plan aids in a good life for your loved one with a disability.
(And how these products can augment each other)***

TWO INFORMATION SESSIONS IN ONE

DATE: September 25th, 2014

***LOCATION: Okanagan College, Room PE C02, in Sunoka Building,
583 Duncan Ave. West, Penticton (Please see attached campus map)***

REGISTERED DISABILITY SAVINGS PLAN

TIME: 6:30 – 7:30 P.M.

The Registered Disability Savings Plan can help you save for the future.

If you or someone you know has a disability and is under 50 years old, find out how the Government of Canada may help, even if you don't have money to contribute.

Topics discussed are the RDSP & Eligibility, Disability Tax Credit (DTC), how to open a RDSP, the Federal Bond and Grants contributions, withdrawals from the RDSP, and there will be time for your other questions

Information sessions are scent-free environments.

This session is funded by the Government of Canada

For more information go to: www.forthefuture.ca
Employment and Social Development Canada
www.hrsdc.ca/disabilitysavings
Revenue Canada Agency www.cra.gc.ca/rdsp

WILLS, TRUST, AND ESTATE PLANNING

TIME: 7:30 – 9:30 P.M.

Presented by Geoffrey White of BC Estate Law, who specializes in charity, disability and estate planning.

His "easy to understand" style will provide answers and further considerations on how best to plan for the future of your loved one with a disability.

Becoming well-informed about wills, trusts, and estate planning is necessary to secure the financial future of your loved one with a disability.

This workshop will answer specific questions about trusts, executors, guardians and the importance of planning a Will. Participants will learn about Committeship, Enduring Power of Attorney and Representation Agreement.

The Wills, Trusts, and Estate Planning session is presented in partnership with Community Living BC.

**Please RSVP to mary@planok.ca or call 250-860-2080
or call CLBC Penticton office to register at 250-487-4436**

PLAN Okanagan

1650 Bernard Ave. Kelowna, BC V1X 6R9 * Phone 250-860-2080 * Email: info@planok.ca * www.planok.ca