



Join Us for
**What's
Changed?**

A Planned Giving
Luncheon

Thursday, Sept. 19, 2019
11 a.m. – 12:30 p.m.

**You'll benefit by attending this
informative & free luncheon
session if:**

You enjoy giving.

You know you want to make a difference and you know your support can help change lives. After you've taken care of your family, you feel it's important to take care of your community.

You have questions.

Recent changes in the tax law and estate planning may have created some confusion regarding how to plan appropriately.

You want answers.

That's why we have assembled a panel of legacy giving professionals to talk to you about recent changes in laws, provide helpful tips to take guess work out of your planning, and answer any questions you may have.

We look forward to answering your questions while providing you with valuable information on laws and codes that can impact your legacy!

Benefits of attending

Our panel of guest speakers will walk guests through different scenarios while discussing and answering your questions on topics including:

- Recent Changes in Tax Law That Affect Estate Planning
- How to Select a Trustee – Is Selecting a Family Member a Good Idea?
- Importance of Life Insurance Policies – do you need one?
- What is the role of a fiduciary?

**RSVP today for this informative,
low-key buffet luncheon event.**

Date: Thursday, Sept. 19, 2019

Time: 11 a.m. – 12:30 p.m.

Location: Zinfandel Grille - Private Room,
2384 Fair Oaks Blvd.
Sacramento, CA 95825

RSVP to: Stephen Horton
Director, Legacy Giving
shorton@ucpsacto.org
Direct 916 283 8312



The Foundation for UCP
of Sacramento and Northern California

The Road For Our Children's Future

Featured Luncheon Topics & Panelists



What's Changed in Estate Planning?

Presenter: **Brian Wyatt**
Estate Planning Attorney



What's Changed in Financial Planning?

Presenter: **John Schoeppach, CPFA, CFP®, CRPC®**
Senior Vice President, Merrill

Getting the Best Trustee for Your Estate

Presenter: **Karen Field**, California
Licensed Professional Fiduciary



Do You Still Need Life Insurance?

Presenter: **Bill O'Keefe**
Executive Vice President, InterWest
Insurance

Questions & Answers with Experts:

Estate Attorneys:

Janet Chediak, Rebecca
Gardner & Brian Wyatt

Financial Advisor:

John Schoeppach,
Merrill Investment Advisor

Fiduciary:

Karen Field, CLPF

Life Insurance:

Bill O'Keefe, InterWest Insurance

Your support
is important to
UCP clients. This
informational luncheon
is complimentary
in recognition of
your support.



If you have any questions, please contact Stephen Horton,
Director of Legacy Giving at: shorton@ucpsacto.org or 916-283-8312.

