

# ESTATE PLANNING *Seminar*

**JOIN US FOR THIS FREE OPPORTUNITY!**

Creating an estate plan, whether it's a living trust or a will, can be a daunting task. Estate Planning addresses difficult issues, such as death, incapacity, finances, and family dynamics. Topics at the seminar will include:

- *How Last Will & Testaments and Revocable Living Trusts Work*
- *Best Method to Title Assets and Assign Proper Beneficiaries*
- *Ways to Provide for Children/Grandchildren with Special Needs*
- *Impact on Estate Plan from IRA/ Retirement Plan & Life Insurance Beneficiary Designations*
- *Mistakes to Avoid in Personal Planning*

## SEMINAR DETAILS



Tuesday, June 23, 2026



5:00 pm - 6:00 pm



Waverly Area Veterans Post | 1300 4<sup>th</sup> Street NW, Waverly, IA



**Sharlene Kline**

563.587.2455

skline@bankfidelity.com



**Paul Kronlage**

563.587.2454

pkronlage@bankfidelity.com



**Dan Flynn**

563.587.2456

dflynn@bankfidelity.com

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