thrivent®

Planning for special needs individuals and their families

Join us for a workshop where Thrivent Financial Advisor Hannah Magrum will discuss the unique complexities that go into planning for special needs individuals and their families. Hannah holds the Chartered Special Needs Consultant® designation, is a parent to a child with special needs and is an ambulatory wheelchair user herself.

Topics discussed will include:

- Resources: state, local and federal.
- Medicaid and Medicare.
- Support options.
- How personal financial planning impacts special needs planning.
- IEP vs. 504.
- Special needs trusts.
- ABLE accounts.
- Tax considerations.

This educational event is designed for our clients and families who wish to learn more about special needs planning. We encourage you to invite anyone who you think may benefit to attend.

Event details

Join us!
Wednesday, March 19, 2025
6:00 - 7:00 p.m. EDT
Virtual Zoom Webinar

Reserve your place today

Registration website or scan QR code

bit.ly/SN31925

Your host

Jake Meza (Amelia's dad!)
Financial Advisor
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215-900-5751

No products will be sold.

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