



# DON'T TAX YOURSELF

A Publication of Bowditch & Dewey's Estate, Financial & Tax Planning Group

## Estate Planning Seminar Series with Kristin Shirahama

APRIL 23, 2019

Bowditch will be hosting a series of programs on estate planning on behalf of the MetroWest Chamber of Commerce, presented by Kristin Shirahama.

Dates and topics include:

- **May 7 – Estate Planning 101:** A review of the basic estate planning documents we all need to protect ourselves in the event of incapacity or our loved ones at death. An overview of Wills, Trusts, Probate, Durable Powers of Attorney, Health Care Proxies, Living Wills, MOLST forms and Medical Releases will be provided with plenty of time for Q&A.
- **July 10 – Beyond Wills: Using Trusts to Reduce Taxes and Protect Assets:** Learn the many uses of trusts: asset protection, avoid probate, estate tax savings, creditor protection, provide for individuals with special needs and protect assets in the event of a need for long term care. This program is ideal for individuals who have accumulated some wealth that they would like to protect for themselves as well as their loved ones.
- **September 26 – Long Term Care Planning: Protecting Assets:** Learn about long term care financing, including the limitations of Medicare and what Medicaid (MassHealth in the Commonwealth) will cover once income and asset requirements for eligibility are met. Learn how long-term care insurance works and changes in the marketplace. Finally, Kristin will discuss planning strategies people use, including irrevocable trusts and annuities to work toward Medicaid eligibility given the income and asset limits.
- **November 6 – Estate Planning for Business Owners:** Program will address topics beyond the basics of estate planning particular to business owners, including business succession planning and buy-sell agreements.

Breakfast will be served. There is no cost to attend.

### REGISTER TODAY!

- Tuesday, May 7  
Estate Planning 101  
7:30 – 9 AM at Bowditch, 200 Crossing Blvd, Suite 300, Framingham, MA

## [Register](#)

- Wednesday, July 10  
Beyond Wills: Using Trusts to Reduce Taxes and Protect Assets  
7:30 – 9 AM at Bowditch, 200 Crossing Blvd, Suite 300, Framingham, MA  
[Register](#)
- Thursday, September 26  
Long Term Care Planning: Protecting Assets  
7:30 – 9 AM at Bowditch, 200 Crossing Blvd, Suite 300, Framingham, MA  
[Register](#)
- Wednesday, November 6  
Estate Planning for Business Owners  
7:30 – 9 AM at Bowditch, 200 Crossing Blvd, Suite 300, Framingham, MA  
[Register](#)