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Money Matters:

All About Trusts: From Estate Planning to Medicaid

Friday, July 26, 2019, 12 - 1:30 p.m.

PROGRAM LOCATIONS:

Science, Industry and Business Library (SIBL), Conference Room 018

Fully accessible to wheelchairs



A living trust is not just for wealthy people. A trust can benefit people with Medicaid and special needs planning avoid the public probate of a will, minimize problems with out-of-country family members or contested estates, and allow for creditor protection. **Daniel A. Timins, JD, CFP®** discusses the mechanics of a trust and when it is not the best solution to these problems. He discusses how trusts differ from one another, which covers your family's needs, everything you need to know about the diverse arena of estate and Medicaid law. Presented by the **Financial Planning Association of Metro New York**.

Daniel Timins is an attorney and a CERTIFIED FINANCIAL PLANNER™. He was named a New York Super Lawyer Rising Star for 2015 through 2018. He held a *10 Star* rating on Avvo.com for two years, and received the prestigious *40 Under 40 Rising Stars Award* from the Business Council of Westchester in 2009. Timins provides pro bono services courtesy of the National Multiple Sclerosis Society and, in conjunction with the Financial Planning Association of Metro New York, created the Wills Drafting Project for victims of domestic violence at the New York City's Family Justice Center. He worked at Merrill Lynch, American Express Financial Advisors, and Alliance Bernstein Investments. Dan received his Juris Doctorate from Pace Law School in White Plains, N.Y., and specializes in Estate Planning, Probate and Medicaid planning.

Seating is on a first come, first seated basis unless otherwise noted.



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