

Event sponsored by Shelly Sutherland at PORTICO

Your Future Matters | Speaker Series

With Helene Wenzel and Betsy Strong

Wednesday, March 25, 2015 | 6-8pm
Second Act, 1727 Haight Street, San Francisco
www.Portico-LYW.com

RSVP: BY MARCH 23 TO SHELLY SUTHERLAND | PORTICO AND PARAGON REAL ESTATE GROUP
SSUTHERLAND@PARAGON-RE.COM OR (415) 874-5014

Too many families have been torn apart through a *dysfunctional viewpoint of money*. Family wrangling can lead to runaway attorneys fees and familial unrest.

Through planning and a belief that *putting the family ahead of fortune*, generations can improve their financial situation rather than lose it to attorneys.

At this seminar, listen to specialists in the field who have practiced **The Heritage Process™** and how to execute their plans through carefully executed estate plans including trusts, wills and powers of attorney for health and finances. Legacies are protected and families are strengthened.

THE SPEAKERS:



HELENE WENZEL
Elder Law Attorney

Helene has an estate planning practice which includes the preparation of wills, revocable trusts; durable powers of attorney; conservatorships; probate and trust administration; and ElderWorks: planning for incapacity, long-term care, Nursing Home care and Medi-Cal eligibility.



BETSY STRONG
President Strong Legacy Planning

Betsy is a native of the San Francisco Bay Area and is a certified financial planner, CFP®. She helped build a financial planning division for the accounting firm of Lautze & Lautze and in 2009 founded her own firm, Strong Legacy Planning. For over 25 years, she has advised individuals, business owners and multi-generational families in the areas of wealth transition and long term financial planning. Securities offered through Sigma Financial Corporation, member FINRA/SIPC. Investment advisory services offered through Sigma Planning Corporation, a registered investment advisor. Strong Legacy Planning is independent of Sigma Financial Corp.

THE HOST:



SHELLY SUTHERLAND
San Francisco Realtor, BRE#01079918

Shelly Sutherland has been helping people buy and sell property in San Francisco for almost 20 years. Her area of specialty is helping seniors and their families plan for retirement through real estate. Living a block away from Second Act, Shelly felt this was the perfect place to hold many events focused on topics for the Boomers. So that you don't miss the next one, join her mailing list on www.Portico-LYW.com.