

# Legal & Financial Planning Basics For Special Needs Families



Join us for a **FREE** informative seminar presented by **Matt Adams**, a retired Lieutenant Colonel of the United States Army and Judge Advocate General's Corps who has experience helping soldiers and their families with estate planning, including wills, trusts and powers of attorney. Matt is also a former Associate Vice President of the Rutgers University Foundation Gift Planning Office, with experience in estate charitable giving.

## About the Guest Speaker:



Steven A. Loeb is the managing shareholder of the Corporate, Tax, Trust & Estate and Elder Law Departments of Fein, Such, Kahn & Shepard, P.C. Steven's practice includes estate planning, estate administration, estate litigation, and charitable planning. He assists clients in implementing such strategies as marital deduction trusts, credit shelter trusts, life insurance trusts, QPRTS, GRATS, limited partnerships, LLCs, dynasty trusts, generation-skipping transfer taxes, as well as various charitable giving vehicles. Steven counsels fiduciaries on the duties related to managing an estate or trust and provides legal advice on probate proceedings, preparing estate and inheritance tax returns, and handles disputes involving complex legal and tax issues.

**WHEN:** THURSDAY, MAY 2, 2019

**TIME:** 7:00PM-8:30PM (REFRESHMENTS WILL BE SERVED)

**WHERE:** MIDDLESEX COUNTY AMERICAN LEGION  
707 LEGION PLACE MIDDLESEX, NJ 08846

**RSVP TO:** THE ARC FOUNDATION OF SOMERSET COUNTY  
Before Tuesday, April 30th 2019  
908-658-3805 or at  
[foundation@thearcofsomerset.org](mailto:foundation@thearcofsomerset.org)

This event is  
free and open  
to the public!

Light  
refreshments  
will be served



**PRESENTED BY:**

Retired Lieutenant  
Colonel

**Matt Adams**

And

**Steven Loeb**

