

SAVE THE DATE!

St. William Catholic Church

&

*The Catholic Community Foundation
of SW Florida*

Presents:

A Complimentary Women's Life Planning Seminar

**St. William Church Hall
Thursday, March 28, 2019**

9:00 am to 10:00 am

(Doors open at 10:00, refreshments provided)

601 Seagate Dr., Naples, FL 34108

PRESENTERS:

The following professionals are all practicing Catholics who will provide attendees with the knowledge they need to make critical health, legal and financial decisions.



Jo-Anne Herina Jeffreys, ESQ., CELA —Juris Doctorate from Seton Hall University School of Law and Bachelor's degree from Boston College. Certified Elder Law Attorney by the National



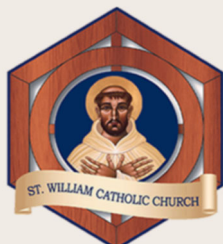
Colleen Murphy, CPA —VP of Private Wealth Management, Capital Wealth Advisors. Bachelor's degree in Business/Accounting from SUNY College at Oswego, earned CPA license at Coopers & Lybrand. Expert in wealth management, family-owned businesses and strategic philanthropy.



Michael Morse, MS—Executive Director, Catholic Community Foundation. Master's degree in Business and Bachelor's degree in Communications from University of Florida. Over 14 years of executive leadership experience overseeing the development & fundraising efforts of not-for-profits.

This seminar is essential for those approaching their senior years, already in their senior years, and those who care for senior relatives or friends. Attendees will obtain important information on:

- *Making a Will can be difficult, but dying without one can make it even more difficult for your loved ones left behind.*
- *Who will make my health care decisions if I cannot?*
- *How will I take care of my financial obligations when I am incapacitated?*
- *How do I avoid guardianship?*
- *Should I have a Will even though I don't have any assets?*
- *Is my Will from another state valid in Florida?*
- *How can I best leave my assets to my family?*
- *Can I reduce taxes and increase my income by making a charitable gift?*
- *Can I make a gift to the Church and receive high-rate payments for the rest of my life?*



REGISTER ON THE WEB OR BY PHONE

<https://dioceseofvenice.regfox.com/lps19w>

Catholic Community Foundation 941-486-4722

WE WELCOME WALK-INS!