

# Estate Planning

**Instructor:** Wade Hamilton CFP, Senior Financial Consultant

October 18 - 10:00 am – 12:00 pm

Maximum: 35 students

**Storm Policy: No classes when schools are closed in Shediac**

## **Course outline:**

- Overview and Important Considerations
- Wills and Power of Attorney's
- Trusts
- Tax Planning for your Estate
- Vacation Properties
- Blended Families

**Instructor Bio:** Wade began his career with Investors Group in 2000, and is now a Senior Financial Consultant. He is a Certified Financial Planner (CFP) which is among the highest designations available to Financial Advisors.

He takes a holistic approach with creating comprehensive plans for retirees and those nearing retirement, while focusing on Investment, Tax and Estate efficiency. He has written in the "Ask the Expert" column as a financial advisor for the Times & Transcript and has been interviewed by Investment Executive magazine in Toronto.

Wade is a member of the Moncton West and Riverview Rotary Club, Chairman of the Investors Group Rotary Charity Golf Classic and a committee member for the Greater Moncton YMCA Century Club, New Brunswick Youth Orchestra and Sistema New Brunswick Capital Campaign. He lives in Riverview with his wife Shelley and two daughters Avery and Peyton.

**Some people are very sensitive to perfumes and other scents. Please respect a scent free environment by not using scented products. Thank you.**

## **A note to seniors about class attendance and absenteeism....**

As you know, our instructors are all volunteers, who work very hard at putting courses together. Your cooperation is appreciated in letting them know if you are unable to attend any of the classes as most instructors plan weekly classes that are appropriate to the number of registered students in the course. If circumstances change between registration and the first class, or if you decide to withdraw after the first or second class, please email [tsccordinator@nbnet.nb.ca](mailto:tsccordinator@nbnet.nb.ca) or call 364-2780. Many courses have a wait list and this could allow someone else to take your place. Sometimes, seniors have travel plans or medical appointments made in advance. It would help instructors to know this at registration, if possible, so that class material may be adjusted accordingly. Illness, as well as other unanticipated and unavoidable conflicts can occur. If you are able, please let your instructor know as soon as possible if you will miss a class.

**Thank you!**