

# 4 FINANCIAL AND LEGAL WORKSHOPS

## VIRTUAL E-LEARNING

### December 9th, 2020

#### (1) 9:30 AM—10:30 AM ESTATE PLANNING

[Presented by Tom McCuiston, McCuiston Law Offices, PLLC.](#)

What is the difference between "estate planning" and having a will? Do you even need a will? Who will take care of you when you can no longer do so? Do you need a trust? This presentation explains some of the fundamental estate documents and what they accomplish. After attending this presentation, you will understand what a will, power of attorney, and trust can and cannot do.

#### (2) 11:30 AM—12:30 PM MEDICARE 101 (Preparing for Medicare)

[Presented by Stephanie Bias, NC Department of Insurance, SHIIP](#)

The Seniors' Health Insurance Information Program (SHIIP) is a division of the NC Department of Insurance that offers free, objective information about, Medicare, Medicare supplements, Medicare Advantage plans, and Medicare prescription drug plans, and Medicare fraud and abuse. This seminar will provide a quick explanation of Medicare and its programs.

#### (3) 1:00 PM—2:00 PM SOCIAL SECURITY MAXIMIZATION

[Presented by Mark Courtemanche, Pinnacle Retirement Solutions](#)

Uncover how to maximize your Social Security benefits and increase your retirement income. Learn how Social Security benefits are calculated and when is the best time to apply for benefits. Coordinate benefits with your spouse and see how current employment will affect benefits in the future.

#### (4) 2:30 PM—3:30 PM PLANNING FOR MEDICAID

[Presented by Kevin Huston, Huston Law Firm, PLLC](#)

Answers to questions about Medicaid eligibility requirements; coverage options; Look-back Period; asset and income limitations; and spousal or family asset protection will be provided by Huston Law Firm. This is a program to learn the basics for preparing for Medicaid either for you or another family member.



**For more information on any of our presenters, simply click the company name and you will be automatically directed to their website.**

**You can choose to attend one or more of the workshops. Use the Zoom link below to attend the session (s). Please enter a few minutes before the session is scheduled to start.**

<https://zoom.us/j/96543412341?pwd=S20zcGtUK1RkWlV6ZmhMQWY5bERWUT09>