** SAMPLE SPEAKER SCHEDULE **
The Fall 2022 course will have similar topics and speakers

Holistic Guide to the Golden Years – Legal & Finance
Spring 2022
Wednesdays 12:30-1:45

Elle Van Dahlgren: elle@vandahlgrenlaw.com; 302-407-5009

2/16/2022: **Intros, Goals, and What to Expect from the Course**

2/23/2022: **How to Ensure You have the Legal Support You Need: Powers of Attorney, Health Care Directives, Wills, and Revocable Trusts**
Elle Van Dahlgren, Elle Van Dahlgren Law, LLC
(302) 407-5009; elle@vandahlgrenlaw.com

Elle advises clients on matters relating to estate planning, estate and trust administration, probate, and asset protection. In addition, Elle provides counsel on planning for long-term care needs and Medicaid qualification for residents of Delaware. Elle prides herself on working hand in hand with her clients to ensure that they meet the goals of their case while also minimizing stress and ensuring all her clients understand what is happening in their case.

3/2/2022: **Daily Money Management – Paying Bills and Otherwise Organizing Your Financial Organization**
Elizabeth Brown & Catherine Friedman, Principled Money Management, LLC
(484) 301-2262; lizbrown@principledmoney.com;
(484) 402-6609; cfriedman@principledmoney.com

Liz provides support for people who need help ensuring their bills are paid correctly and on time, reconciling bank accounts, dealing with bill collectors, determining the ability to retire, and fear that they will outlive their money. She helps with income tax filings, Medicare elections, Social Security benefits, and, if necessary, long-term care Medicaid qualification.

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3/9/2022: **Medicare Made Clear: The Basics of Medicare and its Costs.**
Yolanda Mohammed, Independent Licensed Health Insurance Broker for Medicare Beneficiaries
(302) 229-6376; ysm.insurance@gmail.com

Yolanda has worked within the health insurance industry for over 10 years. She has contracts with various Medicare approved insurance carriers in the state of Delaware.

3/16/2022: **Life & Long-Term Care Insurance in Retirement**
Mike Profit, MBA, MassMutual Greater Philadelphia
(302) 528-3864; mprofit@financialguide.com

Mike believes that knowledge is the key to a successful financial future. He seeks to help make your financial future as successful as you need it to be. Mike gets to know each client so that he can understand their individual needs and what matters most to them. This helps Mike recommend products and strategies designed to meet their current needs, and more importantly, their future needs.

3/23/2022: **Financial IQ – Retirement Risks**
Paul M. Mitchell, CFP, CFBS, Precision Wealth Partners
(302) 325-0700; paulmitchell@financialguide.com

Paul is a CFP® Professional with MassMutual Greater Philadelphia. His goal is to help individuals, families, and businesses grow and realize their dreams. He believes in comprehensive planning, a well-thought-out strategy, and ongoing personalized advice around retirement, investments, tax reduction strategies, insurance, asset allocation, estate planning, and employee benefits.

3/30/2022: NO CLASS – SPRING BREAK

4/6/2022**:** **Tentative: Charitable Giving – Benefits to You in Retirement**

** SAMPLE SPEAKER SCHEDULE **
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4/13/2022: **Long-Term Care Medicaid – What is It and How Do You Qualify?**
Elle Van Dahlgren, Elle Van Dahlgren Law, LLC
(302) 407-5009; elle@vandahlgrenlaw.com

Elle advises clients on matters relating to estate planning, estate and trust administration, probate, and asset protection. In addition, Elle provides counsel on planning for long-term care needs and Medicaid qualification for residents of Delaware. Elle prides herself on working hand in hand with her clients to ensure that they meet the goals of their case while also minimizing stress and ensuring all her clients understand what is happening in their case.

4/20/2022: **Pennsylvania Elder Law**
Kristin Matthews, Esquire, Kristen Matthews Law
(484) 874-2987; kmatthews@kmatthewslaw.com

Kristin is one of approximately 75 certified elder law attorneys in Pennsylvania and one of only 3 with primary offices in Chester County. Her law career has been exclusively devoted to helping clients with estate planning and elder law issues. She works closely with individuals and their families on all aspects of estate and trust planning and administration. Through strategic planning, Kristin helps individuals and families facing the high costs of long-term care to safeguard their lifetime savings.

4/27/2022: **How and Why to Have the Talk of a Lifetime: Funeral Pre-Planning**
Claire Reynolds, Krienen Griffith Funeral Home
(302) 994-9614; defuneral@verizon.net

Claire has been a part of the funeral business her entire life and is a granddaughter of the founders of Krienen-Griffith Funeral Home. Krienen-Griffith is a 104-year-old, family owned and operated funeral home. They serve families who are planning for a loved one's funeral. They also guide families who are interested in preplanning their funeral or the funeral of a family member. Krienen-Griffith compassionately works with families to ensure that funeral arrangements are carried out with dignity and respect for the decedent and their family.

5/4/2022: **Senior Living Options**
Lynn Paxson, Oasis Senior Advisors
(302) 668-0298; Lpaxson@youroasisadvisor.com

Lynn is the owner of Oasis Senior Advisors Delaware and a certified senior advisor. As Oasis Senior Living Advisors, Lynn and her team help fulfill a need for assistance with senior living that is currently lacking in our community. They work closely with seniors and their families to help maintain their dignity and quality of life that seniors truly deserve. Her team is trained in all types of senior living such as memory care, assisted living or supportive independent living. She believes in giving back to the community. They are involved in many organizations that help the local community and/or our seniors.

The Whys and Hows of Home Care – How to Make Your Life Easier!
Tina Curcio, Carpe Vita Home Care
302-482-4305; TCurcio@cvhomecare.com

Tina has worked with CarpeVITA Home Care for almost the last five years. She is thrilled to represent an agency her friend started ten years ago. It is not a franchise and holds the highest level of licensing serving the state of Delaware and southeastern Pennsylvania. The agency prides itself in providing flexible and compassionate in home non-medical care to our clients with customized care plans designed and supervised by our registered nurses to improve health and quality of life.

5/11/2022: **Real Estate and Retirement: Buying and Selling, Tax Credits, Reverse Mortgages, and More**
Tony Klemanski, Berkshire Hathaway HomeServices Fox & Roach REALTORS
(302) 388-7357; anthony.klemanski@gmail.com

Tony has assisted both buyers and sellers achieve their real estate goals for over 17 years. He is licensed in Delaware and

Pennsylvania. Tony served as the 2018 president for the New Castle County Board of Realtors. He is also a licensed real estate instructor and teaches continuing education classes for other agents.

Nina Pappoulis, Esquire, Gregory & Pappoulis, LLC
(302) 421-9109; ninapappoulis@bgplegal.com

Nina advises clients on matters relating to real estate transactions and personal bankruptcy. Nina assists her clients with everything from purchase and sale agreements to real estate closings to foreclosures to loan agreements. She provides every client with detailed explanation and understanding of the nuances and pitfalls of their real estate transactions.

5/18/2022: **Tax Topics for Seniors**
Adam Necelis, CPA, Necelis CPA
(302) 322-1135; adam@neceliscpa.com

Adam discovered his passion for preparing income tax returns while attending Rowan University when he volunteered with the IRS's Volunteer Income Tax Assistance (VITA) program. The VITA program offers basic tax preparation services for students, elderly, and other qualifying individuals. Upon graduating, Adam started working in public accounting for both individuals and businesses. Adam has worked with a wide variety of clients from the retired couple who is receiving Social Security income to the multi-million-dollar corporations and everyone in between.