

Please join us for an informational seminar

# COORDINATING YOUR SPECIAL NEEDS FINANCIAL & ESTATE PLAN

CO-SPONSORED BY:

**HARTY**FINANCIAL

**PLAN**  
Special Needs Trusts

With

Caleb Harty, Financial Advisor\*  
Brenden Harty, Financial Advisor\*

Harty Financial

&

Joan McGrath, Executive Director  
Kathy Vitello, LSW  
PLAN of MA & RI

**MARCH 30, 2021 | 1:00 PM – 2:00 PM**

RSVP to [info@hartyfinancial.com](mailto:info@hartyfinancial.com) to receive a custom meeting link.  
Contact Harty Financial with questions at 978-304-4524 or  
[info@hartyfinancial.com](mailto:info@hartyfinancial.com).

Gain insight into the many issues you may face as a caregiver for special needs persons. Discover how government programs may pay for basic living expenses if certain conditions are met; and, careful planning is in place. Examine some of the steps you can take to make sure your special needs loved ones have the lifestyle you prefer – during your life and after your death.

Presentation will also include a discussion of the following handouts:

- Public Benefits: A Holistic Guide for Families Who Have A Loved One with Special Needs
- Special Needs Planning: Creating a Budget



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