

**FREE**



## ESTATE PLANNING INFORMATION SESSION

Kingsmere Retirement Suites - 287 King Street South Alliston, ON  
Thursday, September 28<sup>th</sup> - 9:30am to 11:30am



Please join us to learn more about creating a strong financial and estate plan, leaving a legacy, and minimizing taxes and fees.

*Don't miss out – Register today!*

### Featuring Presentations By:

#### **Jennifer Poon & Darrin Shannon, Sun Life Financial**

Leave a legacy for your favourite Charity or Foundation using insurance and/or annuities, learn which products may provide the best benefit for you today as well as your estate.

#### **Jerry W. Switzer, Feehely, Gastaldi Law Firm**

Learn some of the legalities around estate planning and wills, top 10 common misconceptions and best practices.

#### **Brian Kennedy, BMO Nesbitt Burns**

Explore common planning techniques including the use of Trusts and Private Foundations.



**Venue Sponsor**

**This is a free event - seating is limited**  
To register, please contact the Foundation:  
(705-435-6281 x. 1262)  
emartin@smhosp.on.ca  
[transformingstevenson.ca/2017-fall-estate-planning-seminar/](http://transformingstevenson.ca/2017-fall-estate-planning-seminar/)