



You are invited to attend a seminar on

## Financial Planning, Special Needs Trusts and Estate Planning for Families of Children/Adults with Special Needs

Sponsored by:  
Merrill Lynch and the Law Office of Susan A. Katzen

Saturday, March 6, 2010  
9:30 AM – 12:00 PM

Westridge Golf Club Clubhouse  
1400 S. La Habra Hills Dr., La Habra, Ca.

**This workshop will focus on:**

- Understanding the importance and process of financial planning – preparing for when you're not there to help
- Protecting government benefits and attaining peace of mind through proper estate planning
- Special Needs Trusts – How they work and when they are appropriate

**Presenters:**

**Brian Perreault, CSNA** – Merrill Lynch, Financial Advisor, Certified Special Needs Analyst, and member of Merrill Lynch's Special Needs Financial Advisors Network and Families of Children With Disabilities program

**Susan A. Katzen, Attorney & Counselor at Law** – Attorney, author and presenter specializing in estate planning, special needs planning, trust administration and probate with 31 years experience

**Continental breakfast will be served**

There is no cost to attend this workshop.  
Seating is limited and reservations are required.  
Please RSVP by Tuesday, March 2<sup>nd</sup> with phone number  
and number of guests attending to Brian Perreault  
at 714-257-4401 or [brian\\_perreault@ml.com](mailto:brian_perreault@ml.com)

