**TO USE THIS TEMPLATE:**

**COPY EVERYTHING AND PASTE INTO A NEW MAIL MESSAGE IN OUTLOOK.**

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| **Do You Have a Loved One With Special Needs?** |

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| ***Planning for the personal needs and financial security of a loved one who is disabled or has special needs may seem overwhelming, but by proceeding in an organized fashion, you can provide for the security and well-being of a loved one.*****In this seminar on Special Needs Planning, you'll learn:*** How to balance your present and future needs with your loved one's present and future needs
* Steps to create and implement personal care, financial, and legal plans for your loved one
* Sources of government benefits
* The role of special needs trusts, including their interaction with Supplemental Social Security Income (SSI) and Medicaid

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.R.S.V.P.**To reserve your spot, please contact me at:**When & Where**DATETIMELOCATION****IMPORTANT DISCLOSURES**Broadridge Investor Communication Solutions, Inc. does not provide investment, tax, or legal advice. The information presented here is not specific to any individual's personal circumstances.To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.These materials are provided for general information and educational purposes based upon publicly available information from sources believed to be reliable—we cannot assure the accuracy or completeness of these materials. The information in these materials may change at any time and without notice.Securities and investment advice offered through Investment Planners, Inc. (Member FINRA/SIPC) and IPI Wealth Management, Inc., 226 W. Eldorado Street, Decatur, IL 62522. 217-425-6340 This communication is strictly intended for individuals residing in the state(s) of IL. No offers may be made or accepted from any resident outside the specific states referenced.  |

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