

Big Canoe.
**WELLNESS
COLLABORATIVE**

EDUCATION PROGRAMMING

Your Financials

Ensure that you and your family are informed and prepared for life's contingencies.



Register For Pre-Plan III Family Crisis - Financials

Monday May 20th, 2-3:30pm Clubhouse - Mts. View Room

We Will Be Addressing Financial Housekeeping.

What Will Be Covered

- Get to know your finances. Things may not be what you think.
- What should we be reviewing.
- How to consolidate finances.
- Family knows what to do when you can't
- What you should avoid with your finances.
- Importance of Relationships & Communication in financial planning.
- What additional planning should be included as we age.
- What documents are easily overlooked.

Presenters

Gayle Falinski CPA with over 40 years in the field. Special interests: Non for Profit Accounting & tax planning and estate preservation.

Tom Mallini spent 43 years in the business world. Mostly in banking with 30 years as the President and CEO of a \$500 million community bank in North Central Florida. He was also active in developing and managing 1500 apartment units and 46 Wendy's restaurants throughout the Southeastern US.

Michelle Smith Assistant Branch Manager and Licensed Banker with a specialty in investments at Renasant Bank. 45 years of banking experience, 15 years at her current branch. Michele has done "everything there is to do" in a bank over her career, including business loans and mortgages.

Register by replying to this email: education.bigcanoewc@gmail.com
More info on WC Services visit: www.bcwell.org

