



TRUST & ESTATE PLANNING WORKSHOP

Wednesday, July 24, 2019 | 6 p.m. - 7:30 p.m.

Premier America Simi Town Center Branch | 1717 Simi Town Center Way, Suite 9

Have you developed a comprehensive plan to manage and protect your assets for the future? Please join Premier America Credit Union and representatives from LPL Financial and Affinity Trusts for a complimentary workshop where you'll learn best practices for effective trust & estate planning.

Topics Include:

- The pitfalls of using joint ownership as a way to transfer property
- Empowering the right person to manage your finances and make medical decisions for you in the event of incapacitation
- Nominating guardians and providing for minor children
- Distribution of assets according to your wishes

RSVP To:

Alex Prokh
Premier America Credit Union Community Branch Manager
805-578-1017

For information about financial planning, please contact:

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CA Insurance License #OD82727

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No Credit Union Guarantee

May Lose Value

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