

Save
the
date

CAPITAL MEDICAL SOCIETY
Membership Meeting & Presentation/Panel Discussion
Tuesday, May 21, 2019
Maguire Center for Lifelong Learning at Westminster Oaks

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"Message from On High: Your Mattress is Not a Financial Plan, and Your Dog Can't Be Your Executor."

You may have heard friends talking about financial and estate planning seminars that they attended, or seen a flyer in the mail or newspaper and thought to yourself:

"That sounds like a good idea, but is it really worth it?"

Yes!

Education and information are the first steps to putting together a timely plan. Procrastination is the number one reason people do not have plans in place. They either procrastinate because the issues are difficult to deal with, such as death, disability, taxes, and investment strategies, or because they do not know where to start and what questions to ask. By attending this seminar, you will be able to listen to a panel of experienced, local professionals address the topics of legal matters, accounting and tax reporting, trusts, fiduciaries, and insurance products. In addition to the panelists, there will also be the opportunity to confer with local financial institution and advisor representatives to arm yourself with the knowledge to make informed decisions in your financial and estate-planning. No matter whether you are single, just married, married with children, approaching retirement, or have parents or adult children who need your help, you will benefit by attending.

Moderator and Panelists include:

Stan Barnes - Managing Director, Barnes Capital Group

Ben Bowersox - Wealth Advisor, Capital City Trust Company

J. Alan Cox - J. Alan Cox Attorney-At-Law and CMS Foundation Board Director; MODERATOR

Paula S. Fortunas - TMH Foundation President & CEO and TMH Vice President,
Retired and CMS Foundation Board Director

Charles Hopkins - V.P., SunTrust Private Wealth Management

Rich Heitmeyer, CPA - Carroll and Co., CPA's

"Since my retirement from Tallahassee Memorial HealthCare, it has been my pleasure to serve on the Capital Medical Society Foundation Board of Directors. The reason I joined the Foundation Board is because I wholeheartedly embrace the Capital Medical Society's mission, goals and objectives and agree that the Foundation's supporting role is essential to accomplishing those vital health initiatives – including service to you through seminars such as the Estate Planning program scheduled for May 21. Estate planning is an imperative for all – especially for individuals such as each of you. Therefore, I cordially invite you to attend the May session. It will be wonderful to see you there and I hope we will have time for some personal visits both before and after the formal presentations." Paula S. Fortunas

Brochures will be emailed out on April 18!

CMS Members - No Charge, CMS Member Spouse/Guest: \$25.00, LCDA Member: \$25.00, LCDA Member Spouse/Guest \$25.00.