

# Portage County Professional Advisors Seminar

Hosted by:



This continuing education event will include four topics of discussion, a light breakfast, and the opportunity to network with peers.

**WED., OCT. 27, 7:30-10:45 A.M. COST: \$10**  
**STEVENS POINT COUNTRY CLUB or ZOOM\***

Presentation Partner:



# PORTAGE COUNTY PROFESSIONAL ADVISORS SEMINAR

WEDNESDAY, OCTOBER 27, 2021  
STEVENS POINT COUNTRY CLUB

7:30 A.M. – 10:45 A.M.  
1628 COUNTRY CLUB DRIVE

\$10 PROGRAM FEE

## Seminar Schedule

- 7:30-8:00 - Registration, light breakfast, and networking
- 8:00-8:10 - Welcome and introduction from the United Way Endowment
- 8:10-8:40 - Medicaid Eligibility Requirements (Attorney Katherine Young - Anderson O'Brien)
- 8:40-9:10 - Asset Protection & Planning Techniques for Long-Term Care (Attorney Amy Eddy - Anderson O'Brien)
- 9:10-9:30 - Break and networking
- 9:30-9:40 - Comments regarding the United Way Endowment
- 9:40-10:00 - Capital Markets Outlook (Tim Pierce - Natixis Investment Managers)
- 10:00-10:30 - Planning for Incapacity with Powers of Attorney (Attorney Steven Thompson - Anderson O'Brien)
- 10:30-10:45 - Wrap up / Evaluations

\*Please note continuing education credits are not offered.

**Register by October 18th, 2021** for in-person or zoom option by completing this form and submitting your \$10 program fee. Registration may also be completed online (see below).

Name		Title		
Organization				
Address		City	State	Zip
Telephone		Email		

Will attend in-person     Will participate via zoom

Mail registration and \$10 payment to:  
**United Way of Portage County Endowment**  
1100 Centerpoint Dr. Ste 302  
Stevens Point, WI 54481

or register online at:  
[www.unitedwaypoco.org/endowment](http://www.unitedwaypoco.org/endowment)

Make check payable to: **United Way of Portage County**

**To register with a credit card, please call  
715-341-6740.**

For more information, contact Laura Pfeil, United Way of Portage County, at 715-341-6740 or [laura@unitedwaypoco.org](mailto:laura@unitedwaypoco.org).



United Way of Portage County  
**Endowment**

ANDERSON O'BRIEN

BERTZ, SKRENES & GOLLA, LLP ATTORNEYS SINCE 1886