

Daily Financial Wellness Livestream

Join us **every day at 2:00pm** for our daily webcast discussion about all things financial. Our Daily Financial Webcast is a great opportunity to listen in to different experts through our 30-minute topical conversation with an additional 30-minute open Q&A for anyone that wants to participate. Topics will include legal, planning, budgeting, tax, investment, senior issues and many, many more, including the topics from the Better Business Bureau.

Visit www.copeceducation.org to watch upcoming livestreams and view full COPEC affiliation disclosure information

Monday	Tuesday	Wednesday	Thursday	Friday
30	1 Topics on Aging <u>Assisted Living: Private Pay vs. Medicaid Waiver</u> Marcia Strall Elder Life Solutions	2 BBB <u>Community</u> Kip Morse Better Business Bureau	3 Planning <u>Emergency Fund</u> Nate Quilter Retirement Strategies, Ltd.	4 Legal <u>What You Should Know About Organ Donation</u> Russ Golowin Golowin Legal
7 Tax <u>Current Events - Monthly Tax Discussion</u> Jill Spradlin RS Tax and Accounting	8 Topics on Aging <u>Balancing Act</u> Lori Wengerd Home Care Assistance	9 Budgeting <u>Budgeting Basics</u> Rick Zwelling, Right Path Financial Coaching	10 Planning <u>College/Education Planning</u> Nate Quilter Retirement Strategies, Ltd.	11 Legal <u>Where to Keep Your Estate Planning Docs</u> Russ Golowin Golowin Legal
14 Investments <u>IRA Distribution Options</u> Jay Lindner Retirement Strategies, Ltd.	15 Topics on Aging <u>Best Practices for Advanced Directives</u> Mike Schoedinger, Schoedinger Funeral Service	16 LinkedIn <u>Difference Between a LinkedIn and a Resume</u> Jeff Young The LinkedIn Guru	17 Planning <u>Roth & Roth Conversions</u> Nate Quilter Retirement Strategies, Ltd.	18 Legal <u>How to Prepare for a Health Care Emergency</u> Russ Golowin Golowin Legal
21 Tax <u>Trust & Estate Taxes</u> Jill Spradlin RS Tax and Accounting	22 Insurance <u>Annuities vs. Annuitizing</u> Jerry Snyder Retirement Strategies, Ltd.	23 Topics on Aging <u>Medicare Open Enrollment</u> Marcia Strall Elder Life Solutions	24 CHRISTMAS <u>No Show</u>	25 CHRISTMAS <u>No Show</u>
28 Investments <u>Settling on Asset Allocation Models</u> Jay Lindner Retirement Strategies, Ltd.	29 Insurance <u>Are Annuities a Good Fit for You?</u> Jerry Snyder Retirement Strategies, Ltd.	30 Computer Security <u>Have Your Accounts Been Hacked?</u> Hollie Houseworth Cloud Cover	31 NEW YEARS <u>No Show</u>	1 NEW YEARS <u>No Show</u>
4	5	<p>** Speakers and Topics are Subject to Change</p> <p>Please visit www.copeceducation.org for the most updated calendar of events and for full COPEC and board affiliation disclosure information.</p>		