Meeting Minutes 04/02/16

8:00am-Set up

8:30 am-9:00am Registration

Opening annoucments-

05/14/16 Seminar

Election of Officers

9:00am-10:30am-Dr. Steven Roensch AP, DOM-Dean of College

Acupuncture-129813 1.5 CG

Intelligent Medicine

Ying/Yang

Balance and Harmony

Any emotion affects the heart

Pathogenic

Endogenic & Exogenic

Pharmaceuticals are a $390 billion dollar industry

4 Pillars-Rest, Exercise, Diet and preventative medicine

Anything held in the mind as you think so shall you be

Iam………………………………………………

This is ………………………………………….

12 channels super hwy organs communicate

Channels can be blocked

Emotions

Blocked channels=short circuit

10:30am-12:00pm-Justin Jacobs-Financial Advisor

Long Term Care (The Financial Aspects)-129814 1.5 G

Retirement Planning

Longer life expectancy

Increased cost of Healthcare

Change in Corporate Benefits

Social Security Uncertainty

Goals and Dreams

Retire Comfortably

Make a major purchase

Plan for a large event

Consideration for achieving your goals

IRA-Traditional

IRA-Roth

529 Plans-Colleges

Analyze investments

Rebalance according to investment objectives/updating for life events

Importance of starting early

Retirement funds & growth

Planning long term care

LTC-Planning 3 steps

Risk, strategy and implement

Planning for people with special needs

Presenting & protecting

Financial Advisor

Focus on planning goals

Outright and Bequests and Gifts

Gifts in excess of $2,000 could disqualify for SSI

Select a Trustee

Trustee options

Trust Funding

Sources of Funding

Life Insurance

Holistic Planning

Develop and Estate Plan

Ongoing review

Life is full of changes

Planning is dynamic process.