



# It's My Money, My Stuff and My Life!

IT IS NEVER  
TOO SOON  
OR  
TOO LATE  
TO PLAN!



## Estate Planning for Your Future

*Presented by the  
Greene County Council on Aging*

If you will be 65 soon, GCCOA will present the next Medicare 101 session on Wednesday April 9 from 2:30 to 4:00pm. This program is free but space is limited. Contact the Council for information or reservations.

**When** Tuesdays

March 4th through 25th, 2025

6:00pm to 8:30pm

**Where** Xenia Community Center  
1265 West Second Street, Xenia  
Next to the Council's office

## Schedule

**Tuesday March 4 6:00-8:30pm**

### **Taking the First Step**

Jerry Mahan, Retired Extension Educator

### **How the GCCOA Can Be of Service**

Karen Puterbaugh, GCCOA

**Tuesday March 11 6:00-8:30pm**

### **Assets, Wills, & Advanced Directives**

David Peterson, Attorney

**Tuesday March 18 6:00-8:30pm**

### **How Does Insurance Fit In?**

Matthew Bennett and Andrew Thielman, Anderson Williamson Insurance Agency, Bellbrook Insurance Agency LLC

**Tuesday March 25 6:00-8:30pm**

### **Trusts, Probate & Taxes**

Dave Cusack, Attorney

## Did you know?

- If you don't have a will, the state of Ohio will decide where your assets will go.
- Fewer than forty-two percent of American adults have a will or living trust.
- Very few Americans have enough saved for retirement.
- Very few individuals actually benefit from a trust.
- Medicare pays for little or no home-care.
- Life insurance proceeds may not go through probate.

## Program Purpose

Planning for our future is more complicated than ever. This four-week course provides an opportunity to start or continue your planning. No matter your age or level of financial resources, this course will jump-start your plan.

We cannot plan for every "what if," but we can educate ourselves and make important decisions that will give us some peace of mind & answer nagging questions such as:

- If I don't have much other than a car, house and monthly income, what kind of planning can I really do?
- My kids are financially struggling. Should I help them?
- Will settling my estate be a burden for my family?
- How should my property be titled?
- Should I update my will and other documents?
- Will insurance cover nursing home care?
- If I leave a young family, will their future be secure?

This program is presented with the cooperation of local professionals volunteering their time and expertise so we can all have the needed tools to plan for our future and the future of our families.

## Registration Information

Cost: \$40 per household & includes binder, program materials and box suppers. Space is limited and we anticipate filling quickly.

Please complete the enclosed registration form and send with payment payable to GCCOA, by April 25.

Location: Xenia Community Center, 1195 W. Second Street, Xenia, OH

## Directions

The Xenia Community Center is on West Second Street, east of Progress, across from the Xenia Nazarene Church, and next door to the GCCOA main office.

Parking and entrance is in the rear.

If you have questions or need more information, please call 937-376-5486 or email [YourFriends@gcco.org](mailto:YourFriends@gcco.org)



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## Estate Planning for Your Future Spring 2025 March 4—25 Registration Form

Please complete and return by **April 25** with \$40.00 payment per household payable to the GCCOA.

Mail to: GCCOA, 1195 W. Second Street, Xenia, OH 45385

or email completed form to [YourFriends@gcco.org](mailto:YourFriends@gcco.org) and pay at the door.

Name (s) \_\_\_\_\_

\_\_\_\_\_ Relationship \_\_\_\_\_

\_\_\_\_\_ Relationship \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email: \_\_\_\_\_

Does anyone attending require accommodations for disability in order to participate in this program?  Yes  No

If yes, please indicate type of accommodations needed: \_\_\_\_\_

A box supper will be provided each week. Please share any diet restrictions:

\_\_\_\_\_

Please share any questions or hopeful outcomes regarding this course:

\_\_\_\_\_

\_\_\_\_\_

Please share any preparations you have made for your future (e.g. Will, DPOA, Trust):

\_\_\_\_\_

\_\_\_\_\_

If attending for your parents or loved ones, what preparations have they made?

\_\_\_\_\_

\_\_\_\_\_

For housing/long term care/Medicaid info, please list specific County/City/State:

County \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_



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