

Financial Education for Captain's Cove Golf & Yacht Club

Wednesday, March 4th at 1:30 & repeated at 6:30 PM
The Community Building at Captain's Cove | 3370 Captain's Corridor, Greenbackville, VA



Beginners Guide to Estate Planning

Key Takeaways:

- How an Estate Plan Works
- The Role of a Power of Attorney
- Common Issues with Estate Plans

Featured Speaker



Rachel Harris
Attorney
The Shore Lawyer



LiveWell

Mitigating Risks Including Down Markets Before + During Retirement

In this workshop, we look at how to utilize your assets to prepare for the uncertainties of life after work. With the right strategies, you can help to ensure that regardless of outside conditions, you keep improving the chances of your own successful future.

Key Takeaways:

- Reliable and unreliable sources of income in retirement
- Learn to take on an appropriate level of risk
- How to tame bear markets and sequence of returns risk

Featured Speaker



Derek Fairchild
Financial Advisor
Baystate Financial