

Using Trusts In Your Estate Plan

Whether or not you use a trust as part of your estate plan takes an understanding of how you want your assets to transfer, not only after you are gone but also while you are still living.

This free seminar will take a look at the purpose of a variety of trust arrangements including: special needs and supplemental trusts, trusts under will, education trusts, irrevocable gifting trusts, irrevocable life insurance trusts (ILITs), charitable trusts, education trusts, qualified personal residence trusts, and the revocable living trust.

Jim Ziebarth, Financial Advisor with Infinex Investments, Inc., located at Fox Valley Savings Bank, will be your host. Our special guest speaker is Terry Klippel, attorney with the law firm of Storm, Balgeman, Miller & Klippel, SC.

Please join us on:

Wednesday, February 15, 2012

1:00 p.m. or 6:00 p.m. at Fox Valley Savings Bank

51 E. 1st Street, Fond du Lac, WI

Light refreshments will be served

Seating is limited and reservations are appreciated. You may RSVP by calling Jim Ziebarth or Mary Lefeber at (920) 923-7776 or (800) 242-7880 no later than Monday, February 13, 2012.

Securities and Investment Advice offered through:
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