

You have been invited to attend...

# MONEY MATTERS COFFEE CLUB

## - Estate Planning 101 -



**Topic:** Money Matters – Estate Planning – Estate Planning Checklist and the Role of the Executor – This is the first in a multi-part series on Estate Planning! You won't want to miss this session!

### ASK YOURSELF...

- What is an estate plan and why do I need one?
- What are the duties of an executor in today's world?
- What about the fees for this job?
- Who is qualified to be an executor?

### YOU WILL BENEFIT BY...

- Having a plan & peace of mind about getting your estate plan in place
- Making sure your loved ones have clear direction
- Making sure you will be making tax effective decisions
- Getting your estate plan up to date
- Making a better choice in selecting your executor
- Being more information about your job if YOU are the executor

**DATE:**

Thursday, September 26, 2019

**TIME:**

2:30pm to 4:00pm

**LOCATION:**

**GOWARD HOUSE**  
2495 Arbutus Road  
Victoria, BC, V8N 1V9

**HOST AND PRESENTER:**

**Pam Katunar**, *Financial Advisor*  
*Raymond James Ltd.*

For more information or to **RSVP** please contact: 250-405-2455 or [pam.katunar@raymondjames.ca](mailto:pam.katunar@raymondjames.ca)

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