



# Estate Planning

## September 21, 2023

**12:00pm – 1:00pm**  
**Virtual Session | Microsoft Teams**

Ever wonder why you need an estate plan and how to get started on yours? In this Finance Workshop, the terms 'estate' and 'estate plan' are defined and discussed. Participants will come to understand that estate planning involves titling, documents, and structures, and learn about the four core components: a will, a trust, and two durable powers of attorney for financial and health matters. Participants will also discover the three mistakes to avoid making while estate planning and see how important it is to think through the people to involve in your estate plan.

### Meet your Speaker:

George Grombacker is a 20 year finance industry veteran, podcaster, writer, and sought-after speaker. He spent 10 years with a Fortune 100 company as an advisor as well as in leadership positions where he impacted thousands of people and developed training curriculums. He's the President of Financial Consulting Professionals, the Founder and Chief Community Officer of Money Alignment Academy and the host of the Money Savage podcast. George is honored to have been named to Investopedia's list of the Top 100 Most Influential Financial Advisors.

#### Registration Options:

Register online at <https://bit.ly/OakFit-EstatePlanning>

If you are unable to attend after registering you will be sent a link to view the recorded session.

For questions, contact Dawn Hunt at [huntd@oakgov.com](mailto:huntd@oakgov.com) • (248) 858-5473

