

# Seminars



CONNOR TAX ADVISORY GROUP, LLC  
TAXES, INSURANCE AND RETIREMENT PLANNING

**Lunch and Learn  
EDUCATIONAL SERIES**  
11:00AM - 12:30PM

Trinity Presbyterian Church  
3115 Providence Road  
Charlotte, NC 28211  
**Room 113**

**Tuesday, September 7th**

**UNDERSTANDING ANNUITIES** - Learn why these are often recommended as safe alternatives to CD's and the stock market.

**Tuesday, October 12th**

**ROTH IRA CONVERSION** - Learn about the recent legislation that allows you to spread out your tax liability over two years if you act THIS YEAR.

**Tuesday, November 2nd**

**LONG-TERM CARE PLANNING** - Understanding the myths and realities behind this sometimes complicated discussion. Also, learn about asset-based long-term care strategies.

**Tuesday, December 7th**

**FINAL EXPENSE PLANNING & MEDICARE SUPPLEMENTS** - New ideas to consider.



David L. Conner has over 23 years of experience in financial & estate planning. Mr. Conner has helped thousands of individuals and their families plan for a successful and worry-free retirement.

The Senior Resource Alliance of Greater Charlotte Presents

**Lunch & Learn, 12:00-2:00 p.m.**  
Willow Grove Retirement  
10043 Idlewild Rd.  
Matthews, NC 28105

**Tuesday, September 21, 2010**

**Featuring:**

**Martha Lentz**, Geriatric Care manager  
**Personal Health Care Solutions**

- Geriatric Care Manager-Is this right for me?
  - Signs of Alzheimer's
- Medical Bills, EOBs: How Much Do I Owe?
- Care in the Home vs. Assisted Living.

**Chris Munson-Dover Mortgage**

- Reverse Mortgages
- Senior housing options and ways to finance

**Janet Taranto**

**Taranto Insurance Services**

- Long Term Care - Facts to know
- Income Streams to ensure your future

**Brian Carney, SILVER CROSS**

- Home Risk Assessment
- Costs and Funding - What does it cost to adapt a home to make it accessible?
- Solutions - What are the latest trends in home modification, assistance and access solutions?

**Integrated  
Financial Strategies**  
Kelly Burke



**10-11:00 a.m.**

**Myers Park Methodist  
Church**

1501 Queens Rd., Charlotte, NC

**Thursday, October 14**

**Is your retirement at risk?**

**Thursday, November 11**

**Stay Calm: Surviving market  
downturns and thinking beyond!**

**Thursday, December 9**

**Lifetime Income: Strategies to  
prevent outliving your money.**



**Lunch & Learn**  
Wednesday, October 20  
11:00-12:30

(Lunch 12:30-1:30)  
Carmel Place  
Independent Living  
5512 Carmel Rd.  
Charlotte, NC



**Savvy Social Security  
Planning:  
What Baby Boomers  
need to know!**

**Presented by  
Bill Romeo**

**American Prosperity Group,  
Retirement & Estate Planning  
Specialist**

**Sponsored by:  
Carmel Place, Carepoint, Inc., &  
American Prosperity Group**



**Lunch & Learn**

**Tuesday, August 31 from 11:00 a.m.-12:30 p.m.**  
Trinity Presbyterian Church—Room 113

Living with

**Chronic Obstructive Pulmonary Disease?**  
(COPD)

If you are living with COPD or emphysema from smoking, learn more about your disease and possible choices which may impact your quality of life through our research study.

For more information join us Tuesday, August 31, 11:00-12:30 at Trinity Presbyterian Church, 3115 Providence Rd. Charlotte, NC 28211 - Room 113 (or the Fellowship Hall if RSVP's are over 18)

**Call 704.365.1995 to RSVP**

To reserve your seat for any of these seminars, please contact The Shepherd's Center of Charlotte  
**704.365.1995** or e-mail [adasst1@shepherdscharlotte.org](mailto:adasst1@shepherdscharlotte.org).