

Hospice Giving Foundation, Hayashi Wayland, Union Bank and Fenton & Keller *presents*

Planning for Peace of Mind

A seminar on Financial Considerations, Legal Decision Making, and the Roles of Agents



SATURDAY, MAY 19, 2018
9:00 AM - 12:00 PM
HOSPICE GIVING FOUNDATION
80 GARDEN CT. | SUITE 201 | MONTEREY, CA

HGFOUNDATION

Cost

COMPLIMENTARY

REGISTRATION IS REQUIRED | SEATING IS LIMITED

RSVP

hospicegiving.org/event/ppm OR 831.333.9023

SEMINAR OVERVIEW

Panelists will discuss and explain:

- Common legal terms, forms, and tools
- Legal permissions and access to information
- Considerations when selecting a trustee or agent
- The role of varied professionals
- How you can prepare to be a trustee or executor



HAYASHI | WAYLAND



PRESENTERS

Scott Brubaker, CFA, Hayashi Wayland

Troy Kingshaven, Attorney at Law, Fenton & Keller

Craig L. Henton, Vice President and Senior Trust Officer Trust and Estate Services, Union Bank

Kris Toscano, Certified Public Accountant, Hayashi Wayland

MODERATOR

Siobhan Greene, CEO, Hospice Giving Foundation



Scott Brubaker



Troy Kingshaven



Craig L. Henton



Kris Toscano



Siobhan Greene