

Information for Life

Planning Resources for Older Adults

OCTOBER 29, 2024 THE RESIDENCE AT QUARRY HILL

465 Quarry Hill Road South Burlington, VT 05403

9:00am	Registration (Refreshments provided by The Residence at Quarry Hill)
9:30am	Welcome & Panel Introduction
9:40am	Panelist Presentations
10:40am	BREAK
11:00am	Moderated Group Panel and Q&A
11:25am	Panel Conclusion & Thank You
11:30am - 12:15pm	Optional Group Community Tour of The Residence at Quarry Hill

SPEAKERS



Your MC

Amy Fracaro-Choate, CRC®, CDFP®
Financial Advisor
Berger Financial Group



Choosing your Financial Advocate

Rebecca Fetterman, CFP®
Financial Advisor
Berger Financial Group



Simple Ways to Leave a Philanthropic Legacy

Ruth Henry, CAP® & 21/64 Certified Advisor
Senior Philanthropic Advisor
The Vermont Community Foundation



Estate Planning 101

Lisa M. Campion, Esq.
Attorney
LMC Law, PLLC



No Crystal Ball: Planning for Future Healthcare Decisions with Advance Directives

Taylor Murray
Advance Care Planning Programmer
Vermont Ethics Network



Prime Opportunities: Downsizing and Leveraging Equity for a Fulfilling Retirement

Christiana Pepin
Owner & Managing Broker
Prime Real Estate Company



Professional Guidance: Worth its Weight in Gold

Alicia Fleming, Certified Senior Advisor
REALTOR® SRES® CSA® CDP®
Golden Guide Senior Living Advisor