ACTS Mission Foundation invites all interested residents and family to attend a program important to your estate and financial planning. To ensure the integrity of this series, we have gained the participation of established professionals in the financial, estate planning, and tax community. We feel that these individuals will provide residents with credible and ethical information and future services.

"Taxation, Investing and Estate Planning, Updates, Tips and Questions"

Wednesday, October 21, 2015, 11:30 AM, Normandy Farms Estates' Auditorium

The presenters are: Michelle Berk, P. C.
Debbie Brown, CPA
Damon Slepian, CFP, CRPC

Michelle is a 1974 graduate of Abington Friends School; 1978 graduate of Syracuse University College of Arts and Sciences International Relations Major;1981 Widener University School of Law Juris Doctor; 1981 Admitted to Bar of the Supreme Court of Pennsylvania, 1981; Director of Montgomery Bar Association and Co- Chair of Elder Law Committee of the Montgomery Bar Association, Pennsylvania Bar Association, 1981, American Bar Association; United States District Court, Eastern District of Pennsylvania, 1982; United State Court of Appeals for the Third Circuit, 1983; Pennsylvania Bar Institute Estate Practice Certificate, 2003; Supreme Court of the United States of America, 1985. Law Offices of Michelle C. Berk, P. C. areas of Practice: Elder Law; Social Security Disability; Estate Planning and Estate Administration; Family Law; Real Estate; General Practice: Accredited attorney for the Department of Veterans Affairs (VA).

Debbie is a 1977 graduate of Melrose Academy; 1981 graduate of Villanova University College of Commerce and Finance with a Bachelor's Degree in Accountancy. Senior Accountant for Laventhol and Horwath, PC 1981 to 1984. CFO for F.O.Merz, Inc., Importer of West Chester, PA from 1985 to 1987. Since, 1987, Debbie has been practicing as a tax preparer for individuals and small businesses.

Damon, Wealth Management Advisor, joined Merrill Lynch in 1993. He is a qualified portfolio manager who, in addition to providing traditional advice and guidance, can help clients pursue their objectives by building and managing his own personalized or defined strategies, which may incorporate individual stocks and bonds, Merrill Lynch model portfolios and third-party investment strategies. When servicing clients through the firm's Investment Advisory Program, a portfolio manager may manage his strategies on a discretionary basis. Damon holds the following designations: CERTIFIED FINANCIAL PLANNER™ certification awarded by the Certified Financial Planner Board of Standards, Inc. and Chartered Retirement Planning Counselor℠ (CRPC®). He earned a bachelor's degree in business administration from Richmond University and an MBA in marketing from Temple University. Damon and his wife, Jodi, have three children and live in Wynnewood, Pennsylvania.

The session is planned for a 60-minute format, with the three professionals each offering comments with extra time for specific questions and examples.

ACTS always recommends that you discuss the issues with your attorney, financial planner, tax advisor, and/or family members before making any substantial gift.