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, September 9, 2015, 1 PM, Spring House Estates' Auditorium

The presenters are: Michelle Berk, P. C.
Debbie Brown, CPA
William Schindler

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.

Bill is an experienced financial advisor with over twenty-three years of experience in the financial services industry. He began his financial services career in 1991 with the Lutheran Brotherhood and quickly became a member of the prestigious Top Club. Additionally, Bill was recognized as a Life Member of MDRT, awarded Court of the Table (MDRT), National Sales Achievement Award, and National Quality Service Award. While with Legg Mason, he qualified for their highest honor, the Chairman's Club, through Hartford Life. In 2014, Bill and his business partner joined First Financial Group, a general agency of Massachusetts Mutual Life Insurance Company (MassMutual) to better serve the needs of their clients. Bill specializes in wealth and risk management, employee and retirement benefit structuring for small business, municipalities and government entities, and academic institutions. He serves clients at every stage of life and believes that as a financial advisor, it is his duty to help individuals, families, and business owners reach their financial goals. Bill has been a featured speaker through The American College and throughout the country regarding various strategies and techniques related to the financial services industry both live classroom training and multi-media outlets within Philadelphia marketplace. He has been the host of Money Matters, a Comcast TV/Malvern Press Production, and a financial columnist for The Collegeville Way Newspaper.

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.