

Seminars



Bill Romeo
American Prosperity
Group 10-11:00 a.m.
Trinity
Presbyterian Church

Thursday, July 29

Financial Blunders—Lessons we Never Learn: ♦When and how to deal with stock and stock options. ♦How to preserve and protect our assets against a plunging market. ♦The bank: is it really the place to “save” money? ♦How truly naive we are in understanding the market ...Great opportunities, great risks.

Thursday, September 23

Stress & Your Health: ♦What stress does to anyone under financial difficulties. ♦What creates the stress response in the body? ♦What action steps you can take.

For the above seminar, all participants will be entered into a drawing for a **FREE** massage at **Essential Therapy** by Laura Murphy, licensed massage and bodywork therapist.

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Lunch & Learn
11:00 a.m. —12:30 p.m.
Trinity Presbyterian Church

Tuesday, August 17
“Financing Options for
Long-Term Care Needs”

Presented by a panel of experts
sponsored by



“Comforting solutions for
in-home care”

Lunch provided by
Summit Place of South Park
Assisted Living & Memory Care

Kelly Burke
Integrated
Financial
Services



10-11:00 a.m.
Myers Park Methodist
Church

Thursday, July 15

The Search for Retirement Income:
Making the most out of your nest
egg.

Thursday, August 12

CD Alternatives: Where can I go
now that CD returns are low and I
still need security?

Thursday, September 16

IRA Distribution Planning: Taking
income from your IRA and how the
IRA is treated in Estate Transfer.



Lunch & Learn
11:00 a.m.—12:30 p.m.
Trinity Presbyterian Church

Tuesday September 14
“Retirement Care Options”

Presented by
Phil Koch, President



Defensive Driving Class
Taught by Officer Howard Setzer

Tuesday, July 27
9:30 a.m.—2:00 p.m.
(30 minutes for lunch—please bring
your own)
Trinity Presbyterian Church
Room 113

Designed for Baby Boomers and up (50
and over), the class helps drivers refine
existing skills and develop safe,
defensive driving techniques.

Cost is \$12 for AARP members and \$14
for non-members—payment is due the
day of class.

Please make checks payable to AARP!

Upon completion, you will receive a certificate from AARP. You must attend the session in its entirety to receive your certificate. The state of NC currently does **not** require auto insurance companies to offer a discount for completing the course. Please check with your insurance agent to see if your insurance company offers a voluntary discount.

Lunch & Learn
11:00 a.m. —12:30 p.m.
Atria Merrywood
Senior Living
3600 Park Rd.

Tuesday, August 3
Sabrina Winters, Attorney



“Peace of Mind for
your Family
Why Estate Planning
is a gift of love!”

Registration is required for all of the above seminars, please contact The Shepherd’s Center of Charlotte, 704.365.1995 or adasst1@shepherdscharlotte.org.

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