



**SDSU's Benefits Office and
The Employee Assistance Program Presents**
Estate Planning, Wills & Trusts

**Please bring your lunch and join us for this
Lunch & Learn Workshop**

Date: Tuesday, October 22, 2013
Time: 12:00 pm to 1:00 pm
Location: Extended Studies Bldg., Room 403
RSVP: Space is limited. Contact Tanya Vallejo at
tvallejo@mail.sdsu.edu or (619) 594-4646

Estate Planning, Wills, and Trusts go hand in hand. This one hour presentation covers the fundamentals of each topic below:

- Identify reasons for the importance of Estate Planning
- Identify assets to consider for Estate Planning
- Define key Estate Planning tools (Wills/Trusts, and their differences)
- Learn the process of Estate Planning
- Develop strategies for communicating about Estate Planning with older relatives and other family members



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