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Estate Planning for Parents of Children With Special Needs: Presentation Oct 3 in Westport

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Categories : [Community Organizations](#), [Parents & Kids](#)

Tagged as : [Star Inc. Lighting the Way 2018](#)

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Parents of children with special needs are invited to a presentation co-sponsored by STAR Inc., Lighting the Way on strategies for special-needs estate planning on Oct. 3, in Westport.

— *an announcement from* [STAR Inc., Lighting the Way](#)

Several financial planning specialists will conduct the free presentation and informal discussion: Kimberly Greenberg, a STAR Birth to Three parent, and Armand Del Medico, both investment managers with UBS; Jamal Davis, a wealth planning Specialist also with UBS; and Jennifer Basciano, principal of Brody Wilkinson Law Group.

This combination of expertise provides a powerful holistic solution based team.

If You're Going ...

- The information session, hosted by Mickey and Candace Herbst, will take place from 9:30 to 11 a.m. on Oct. 3, 2018 at Birchwood Country Club, [25 Kings Hwy. South, Westport](#).
- A complimentary continental breakfast will be served.
- For additional information or to register, please contact Peter Saverine at 203-846-9581 x 302 or email psaverine@starct.com.

More About the Presenters

[Kimberly Greenberg](#) is vice president-wealth management and financial advisor for UBS. She is a chartered special needs consultant (CHSNC) who understands first-hand the needs of families with special needs children and works closely to help them navigate longevity planning, wealth transfer strategies and life transition planning.

Greenberg resides in Westport and has two daughters, one with special needs, Parker, who has been served by the Birth to Three Program at STAR.

Armand Del Medico, CFP, CIMA, is senior vice president-investments, senior portfolio manager and wealth advisor at UBS. He works closely with business owners, professionals and families to help navigate the complexities of their wealth, preserve, and grow assets for future needs.

To learn more about these financial advisors and UBS, [visit this Web page](#).

Kimberly and Armand will also share their insights on their recently published white paper on this topic.

Jamal Davis AWMA, is a wealth planning associate at UBS. From planning a home purchase to preparing for retirement, he values getting to know clients and making sure they have the right tools in place to reach their goals.

Prior to joining UBS, Jamal worked at GE Capital, where he successfully completed GE's Financial Management Program. Jamal then joined the sales and trading desk for middle market loans in New York City, where he focused on compliance and trading activity. Jamal was also part of the African-American Forum while at GE Capital.

Jennifer Basciano, a principal with the [Brody Wilkinson Law Group](#), practices in the areas of estate

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planning and trust and estate administration. She works with clients to gain a thorough understanding of their goals and values as she develops individualized plans for their family or business.

Her trusts and estates work is characterized by her ability to identify clients' needs based on their phase of life.

About STAR Inc. Lighting the Way

[STAR, Inc., Lighting the Way](#) is a not-for-profit organization established in 1952 to serve individuals of all ages who have been impacted by intellectual and developmental disabilities, as well as providing support services to their families.

STAR creates opportunities for individuals to live full lives with independence, freedom of choice and personal growth by providing support, services and advocacy.

STAR informs and encourages the community to recognize and appreciate the value of all individuals.