

## **For Those With Family Members With Special Needs: Experts to Discuss Estate Planning**

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**Categories :** [Community Organizations](#), [Healthy Living](#)

**Tagged as :** [Estate Planning Advice 2019](#), [Star Inc. 2019](#), [Star Lighting the Way 2019](#)

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A free presentation and discussion next week on estate planning for those who have family members with intellectual and emotional disabilities.

At the event, co-sponsored by Star, Inc., Lighting the Way and JumpSTARs a lawyer as well as UBS investment and planning specialists will speak. A complimentary continental breakfast will be served.

— *an announcement from* [Star Inc.](#)

Titled "Special Needs Financial Challenges and Trusts," the event will take place from 9:30 to 11 a.m., Thursday, Oct. 24, at the Country Club of Darien, 300 Mansfield Ave.

The free breakfast is meant to offer insights for people who want to learn fundamental tools necessary to understand essential strategies in navigating the complexities of special needs estate planning.

The information session is co-sponsored by Star, Inc., Lighting the Way and JumpSTARs.

### **Legal and Financial Experts at the Event**

**[Kimberly Greenberg](#)** 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 lives in Westport and has two daughters, one with special needs, Parker, who is 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.

Kimberly and Armand will also share their insights on their recently published White Paper on this topic.

You can learn more about these financial advisors and UBS [here](#).

**Jamal Davis** is a wealth planning associate at UBS. Prior to joining UBS, Jamal worked at GE Capital.

**[Jennifer Basciano](#)**, principal of Brody Wilkinson Law Group, practices in the areas of estate planning and trust and estate administration.k

### **About Star Inc.**

Star Inc., Lighting the Way is a not-for-profit organization established in 1952 to serve individuals of all ages who are impacted by intellectual and developmental disabilities (I/DD) in

Fairfield County, 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. For more information about Star, Inc., Lighting the Way please visit [www.starct.org](http://www.starct.org).

***Darienite***

***News for Darien***

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For more information or to register, please contact Peter Saverine, Star director of philanthropy, at 203-846-9581 x 302 or email [psaverine@starct.com](mailto:psaverine@starct.com). Space is limited.