

**New York City, NY Summit of Strength**  
**JW Marriott Essex House**  
**Grand Salon**  
**March 4, 2023**

**Special Plans for a Special Life, Financial and Estate Planning**  
*By: Richard Rubenstein, Esq.*

1. **Who am I?**
2. **Why am I here?**
3. **Basics of Estate Planning**
  1. Will
    - Executors, Guardians & Trustees
    - Age of distributions
  2. Living Will
  3. Healthcare Proxy
  4. Power of Attorney
4. **Supplemental Needs Trust**
  - 3<sup>rd</sup> Party Trust
  - 1<sup>st</sup> Party Trust
  - Letter of Intent Guideline
5. **Able Account**
6. **Funding Mechanisms and Planning Opportunities**
  - Assets
  - Life Insurance
7. **Advocacy (you are your child's greatest advocate)**
8. **Question and Answer**