

# Moving Forward on Your Own: Life After the Death of Your Husband



## Schedule of Events

8:45-9:00 - Registration

9:00-9:10 - Introduction

9:10-9:40 - Emotional Issues

- Dealing with grief
- What you need most
- When to get professional help

9:40-10:10 - Legal Concerns

- Planning Checklist
- Explanation of basic estate planning documents
- Probate vs. Non-Probate Assets
- Process of Administering an Estate

10:10-10:40 - Financial Concerns

Presentation: "How an estate plan puts you in Control"

- Financial Triage
- Identifying and processing assets and liabilities
- Financial Planning for the long term

10:40- 11:00 Recap and Q&A

This complimentary workshop is designed to help women who have lost their spouse with putting life's pieces back together. With the guidance of trained professionals, *Moving Forward on Your Own* deals with the emotional, legal, and financial concerns of widowed women in a logical yet compassionate way.

## When

Held the third Thursday every other month from 8:45 to 11:00 am

## Save the Date! Information

For event details or to RSVP, please visit [ameripriseadvisors.com/donna.s.cates](http://ameripriseadvisors.com/donna.s.cates) events page, call: 205.909.3126 or email: [donna.s.cates@ampf.com](mailto:donna.s.cates@ampf.com)

## Hosted by



Donna S. Cates, CDFA™, CRPC®  
Financial Advisor, Associate Vice President  
Ameriprise Financial

### Rotating Professional Panel:

#### Mental Health Professionals:

Mary Ellen Capps, M Ed, LPC; Shannon S. Crenshaw, M Ed, LPC; and Stephanie Davis MA, LPC, NCC

#### Estate Planning & Probate Professionals:

Melanie Bradford Holliman, Counsel

Tanya Shunnara, Counsel

This is an informational event. There is no cost or obligation. See important disclosure information on the reverse side.

## **2019 PRESENTATION SCHEDULE**

**02/21/2019**

**4/18/2019**

**06/20/2019**

**08/15/2019**

**10/17/2019**

**12/12/2019**

**Workshop is held at the office of Donna S. Cates**

**Ameriprise Financial, 1500 Urban Center Drive, Suite 200, Birmingham, AL 35242**

**205.909.3126 ~ donna.s.cates@ampf.com**

Neither Alexander Counseling Services LLC, Active Transitions LLC; Mary Ellen Capps, M Ed, LPC; Bradford & Holliman, LLC, or Sirote & Permutt, PC or their representatives are affiliated with Ameriprise Financial.

**Advisor office located at Liberty Park, 1500 Urban Center Drive, Suite 200, Birmingham, AL 35242.** A formal invitation will be sent to those interested prior to the event.

Ameriprise Financial and its representatives do not provide tax or legal advice. Consult your tax advisor or attorney regarding specific tax issues.

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