



LIFE NAVIGATORS
Your Disability Partner EST. 1949



Special Needs Trusts — Large and Small A Key for Your Future



Life Navigators Trust Presentation
Wednesday, October 11, 2023
8:30 am — 11:30 am

Our Presenters



Nancy K. Schoenberg, VP - Senior Trust Administrator
Prairie Trust, A Division of Waukesha State Bank

Nancy joined Prairie Trust in December 2013 and is responsible for the administration of trusts, estates, and employee benefits plans. Prior to joining Prairie Trust, Nancy worked at Talmer Bank f/k/a First Banking Center in Burlington for thirteen years. While there, she supervised trust operations and administered trusts and employee benefits plans. She received her Bachelors of Business Administration in Finance from UW-Whitewater in 1991. She also earned her Retirement Services Professional Certification and completed Trust I from Cannon Financial Institute in 2002.



Mary Till, Associate Director
Life Navigators

Mary has been with Life Navigators for over 20 years and has worked in a variety of programs that support kids and adults with disabilities and their families. Mary currently manages the Trust Program and oversees numerous programs supporting kids and adults with disabilities and their families including Corporate Guardianship, Information & Assistance, Family Support and Self-Advocacy & Independence. Mary received her Bachelors in Social Work from Marquette University in 1993.



Elizabeth Ruthmansdorfer, Attorney at Law
Ruthmansdorfer Law Group, S.C.

Elizabeth is the owner and managing partner at Ruthmansdorfer Law Group, S.C. and concentrates her practice in the areas of lifetime and estate planning, which includes special needs trusts, powers of attorney, probate and trust administration. Elizabeth also assists clients with elder law issues and practices guardianship law. Elizabeth is a member of the Wisconsin Bar Association, the Milwaukee Bar Association, the Association for Women Lawyers and the NAELA. Elizabeth graduated from Marquette University Law School in 2003. Elizabeth currently serves as President of Life Navigators' Board of Directors.



Adam Keller, CLU, CLTC, AEP, Wealth Management Advisor
The KELLER Group; Northwestern Mutual

Adam has served on the Life Navigators Board of Directors since October 2010, including two years as Board President. Adam and his expert team build comprehensive financial plans for families who have loved ones with disabilities. The KELLER Group provides independent fiduciary investment management services coupled with independent custom insurance plan design and consultation. Adam has been in practice for over 19 years and is a graduate of UW-Oshkosh. www.adamskeller.com

Do you have a client or a loved one who could benefit from a special needs trust?

Do you have questions about how public benefits and special needs trusts work together?

The Life Navigators Trust Program offers multiple trust options to meet each beneficiary's individualized needs both now and in the future.

Life Navigators is one of two special needs trust programs in the state of Wisconsin.

Join our panel of experts to learn more about special needs trusts and why they are right for your client or family member.

Wednesday, October 11, 2023

8:30 am — 9:00 am Registration & Continental Breakfast

9:00 am — 11:30 am Program

Journey21

**1671 Old School House Rd
Oconomowoc, WI 53066**

There is no cost to attend. Seating is limited.

RSVP by October 4 at the online link:

<https://journey21.eventsmart.com/events/specialneedstrusts/>

Questions on registering?

Contact Caty at 262-399-0100

or cbulgrin@journey21.org

Presentation is for attorneys, estate planners, financial advisors, disability professionals and families.



Prairie Trust, a local financial institution, serves as Trustee for all Life Navigators Trusts.

This Presentation Offers Information on Life Navigators Trust Options

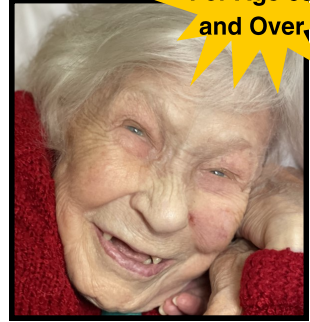
Large and Small — Affordable for Individuals and Families



Trust I – Community Trust
*(Third Party Trust for
Futures Planning)*



Trust II – Pooled Trust
*(Funded Entirely with
Beneficiary's Assets)*



Trust III – Pooled Trust
*(Funded Entirely with
Beneficiary's Assets)*

For Age 65
and Over

The Life Navigators Special Needs Trust Program is designed to promote comfort and happiness and protect and preserve benefit programs for individuals with disabilities.

Developing a plan for the financial and service needs of individuals with disabilities is critical to Life Navigators' mission. A Special Needs Trust as part of an overall financial plan provides a lifetime of security and protection and provides families peace of mind that their loved one with a disability will enjoy the highest quality of life.



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