

Downsize Your Home Upsize Your Life

A seminar on the decisions involved in downsizing your home

TOPICS – We Will Cover:

- Do you prefer the “rooftop view” or an “upper deck” view?
- Will you have a “ladder” story? (hint: we hope not)
- Is your home an *asset* or a *liability*? Surprising answer
- How to build a solid income “floor”
 - How to maximize social security benefits
 - Avoid enormous IRA mistakes
 - When to use home equity before or after you sell
- Secrets Retirement Communities Don’t Want You to Know
- How to prepare if you get sick
 - Estate planning mistakes covered
 - *Long term care insurance* - is it a good deal?
 - Setting up your plan if you get sick - what to cover?
- How to prepare if you live a LONG and HEALTHY life

Join us for an informal workshop where your questions will be answered and together we can take some of the mystery out of this process. We look forward to having you join us!

Time

Saturday June 15, 2013
9:00 AM – 11:00AM
Breakfast Will Be Served

LOCATION

Golden Pond
50 West Main Street
Hopkington, MA 01748
Seats are free but limited
Call 508-435-1250 to Ensure Seating

YOUR PRESENTER



Alfred L. Angelici, **Managing Director**

Alfred served the last 14 years at Fidelity Investments and joined Walnut Hill Advisors, LLC in 2012. Alfred has served as chief investment officer for a private trust where his duties included portfolio construction, and securities research and selection. Alfred holds a Master's degree in Investment Management from Boston University, a Bachelor of Science degree in Operations Management from Northeastern University, and a Bachelor of Science in Business Administration degree from Boston University.

RSVP – Call 508-435-1250
Golden Pond reserve your spot during daytime hours