



5/17/18 Meeting Minutes 6:30-8:30PM

CGS Auditorium - location changed from meeting schedule sheet. Noted on posted agenda.

The meeting was called to order by Carolyn Wilkinson, President. Other officers present - Brian Gaspar, Treasurer.

Carolyn gave an update on upcoming events

Lowell Spinners outing for Methuen SEPAC families in July. SEPAC will pay for all family members to attend up to 50 tickets total and messages need to be sent to methuensepac@gmail.com specifying # of tickets needed. 50 total so 1st come-1st serve.

Next XBOX night coming, date to be announced soon.

Special Needs Financial planning

Presenter: Caleb Harty, Certified Financial Planner. He brought with him Atty. Joe Morana Mr Harty covered in detail the many factors needed to be considered when coming up with a financial plan for your family's future based on their individual needs and that of a special needs member's future needs as well. He cautioned that it's not all one size fits all and used some attendees personal situations to give examples of some plausible plans. He brought Atty Morana with him to specifically address the procedures for setting up Special needs trusts & guardianships if necessary. Questions were asked & answered during the presentation. Atty. Morana & Caleb left their contact info as they both offer free consults.

Public Q&A after presentation

Adjourned at 8:30PM