Wagnalls Memorial Wealth Management Series

2022 Presentation Series

This financial education series is presented by local professionals free of charge on the fourth Tuesday of each month, May through November, 2022. All sessions are at 6:30 pm in the Community Building North Room.

Light refreshments will be served. For more information about a particular session, please visit www.wagnalls.org and look under the Programs tab.

May 24 — **First Time Home Buyer**

Presented by Jeff Cotner, ABR, SFR--RE/MAX ONE – The Glanzman Group; Kelly Thacker, ABR/e-Pro/CT--HER, REALTORS®. The Gilmore Group; Tom Knecht, broker/owner--RE/MAX Apex; McKinsey Gilligan, associate--RE/MAX Apex; Patrick Glanzman, Loan Officer--Revolution Mortgage; and Susan Tridico-Prince, Account Executive--Chicago Title

June 28 — **Retirement Planning, Insurance, Secure Act changes, IRA Trusts**

Presented by Greg Bauers, CPFA, Financial Advisor / Branch Manager and Steven Bauers, Financial Advisor--Bauers Financial Group – Raymond James Financial Services; Craig M. Vandervoort and Joseph M. Nixon, Principal Members -- Sitterley, Vandervoort & Nixon, Ltd.

July 26 — **Estate Planning, Trusts, Wills and Probate**

Presented by Craig M. Vandervoort and Joseph M. Nixon, Principal Members -- Sitterley, Vandervoort & Nixon, Ltd.

August 23 — **Understanding Cryptocurrency**

Presented by Mark Cialone, Chief of Staff to the CEO - Coinbase; Steven Bauers, Financial Advisor--Bauers Financial Group – Raymond James Financial Services; Craig M. Vandervoort, Principal Member -- Sitterley, Vandervoort & Nixon, Ltd.

September 27 — **Senior Scams/Identity Theft**

Presented by Danielle Murphy, Consumer Educator - Consumer Protection Office of Ohio Attorney General Dave Yost

This event is not sponsored by the Ohio Attorney General's Office. The Ohio Attorney General's office does not specifically endorse or recommend The Wagnalls Memorial or any products or services affiliated with The Wagnalls Memorial

October 25 — **Social Security, Medicare and Medicaid**

Presented by Craig M. Vandervoort, Principal Member -- Sitterley, Vandervoort & Nixon, Ltd. and Jennifer H. Sitterley – Sitterley Law, LLC

November 22 — **Year End Tax Planning, Charitable gifting, Gift Tax & Estate Tax**

Presented by Steven Bauers, Financial Advisor--Bauers Financial Group – Raymond James Financial Services; Craig M. Vandervoort, Principal Member -- Sitterley, Vandervoort & Nixon, Ltd.; and Victor Christopher, CPA, CVA – Partner, Snyder & Co., Certified Public Accountants