

# March 21, 2019 Meeting

The next regular program for the Knoxville Estate Planning Council will be held on Thursday, March 21, 2019, at Cherokee Country Club. This meeting will be a joint event with the Knoxville TSCPA Chapter.

Meet and greet 5:15 PM

Dinner: 5:45 PM

Presentation: 6:00 PM

## Long Term Care Issues, Concerns, and Solutions

**Gabrielle H. Blake, LCSW—Franklin & Kyle Elder Law, LLC**

**Nancy P. Hertwig, CLU, ChFC—New York Life**

**Glen Kyle—Franklin & Kyle Elder Law, LLC**

An experienced panel of experts from the fields of social work (Gabrielle Blake), financial advisory (Nancy Hertwig), and legal (Glen Kyle) will be presenting on this important issue. Estimates are that approximately 10,000 people turn age 65 every day. Of those aged 55 to 64, those who have saved for retirement have accumulated approximately \$200,000 in savings. 45% of that age group have no retirement savings. With home health costs averaging \$20 per hour, and facility costs averaging greater than \$200 per day, a potentially ruinous financial crisis is on the horizon for both families and society. Long term care planning is more than just the cash to pay for care. It's as much about having control and choices when care is needed, while protecting retirements savings, one's family's lifestyle, and the health of a family caregiver. The solutions will require a multi-discipline, and often a multi-generational approach. The panel discussion will be moderated by Chuck Farmer.

**Course objectives:** to provide professional advisors with the knowledge and tools to coach their respective clients in preparing for the social, financial, and legal implications of a long-term care event.

**Gabrielle Blake** is a Licensed Clinical Social Worker and joined our firm as an Elder Care Coordinator in 2010. She has a bachelor's degree in human services from Tennessee Wesleyan College and a Master of Social Work from the University of Tennessee. In 1997, Gabrielle began her career as a community counselor at Charter Lakeside Psychiatric Hospital in Memphis, Tennessee. After obtaining her license as a clinical social worker (LCSW), Gabrielle was a group and individual therapist at the Peninsula Senior Day Hospital, a Covenant Health program. She continues to work with Peninsula Lighthouse on an as needed basis.

**Nancy Hertwig** is a Financial Advisor with New York Life and an Investment Advisor Representative with Eagle Strategies, LLC. She holds designations from The American College as a Chartered Life Underwriter, Chartered Financial Consultant, and Chartered Advisor for Senior Living. Nancy is a graduate of Tusculum College with a B.S. in Business Administration. She began her career with New York Life in 1989, celebrating 30 years with the company in September.

**Glen A. Kyle** is the owner of the Knoxville law office of Franklin & Kyle Elder Law, LLC. His practice in the specialized field of elder law over the past five years has included Life Care Planning, Medicaid and Veterans' Benefits planning, estate planning (powers of attorney, wills, and trusts), conservatorships, probate and trust administration. earn a law degree from the only Tennessee University with an Elder Law Legal Clinic, the Universi-

**KEPC members who are also members of the TSCPA should register at the TSCPA website for the regular chapter meeting.**

Non-TSCPA members should RSVP no later than 12:00 PM on Monday, March 18, 2019. Guests are welcome to attend the meeting with a member. There is a guest fee of \$35. Students and emeritus members have a special rate of \$10. To register for this course, go to [kepctn.org](http://kepctn.org), or call 865-474-7360.

## Next Knoxville Estate Planning Council meeting scheduled for May 16, 2019

### Thank you to the website sponsors for 2018—2019



**Additional website sponsorships for 2018—2019 are available! Please contact Carol Bangash or a board member if your company is interested in becoming a web sponsor.**

### Member Contact Information

KEPC's main form of communication is email. If any of your profile information changes, especially your email, please update the necessary information on the KEPC website ([kepctn.org](http://kepctn.org)). Meeting announcements, membership renewals, and other information is delivered via email. Please do not uncheck the "Contact Preference" for email under "Contact Information". This feature allows KEPC to send emails to members but will not display your email if that is your preference. Regular meeting announcements are sent out in January, March, May, September, and November. Membership renewals are sent out in August. If you stop receiving regular emails, please contact Carol Bangash.

Delivery Method: Group Live

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

CLE, CLU, CPE Credit: 1 hour Tax

CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

Knoxville Estate Planning Council is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org)

#### Knoxville Estate Planning Council

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