

Please join us for an informational seminar

“Coordinating Your Special Needs Financial & Estate Plan”

Webinar for



September 2, 2020

12:00 – 1:00 PM PT

Topics include maximizing government benefits, preserving government benefits via estate planning techniques, financial planning (creating a long-term budget for child, how to efficiently fund special needs trust), ABLE Act, and more.

Sponsored by:

Caleb Harty, CFP®

Financial Advisor*

Founder and Principal, Harty Financial

RSVP to info@hartyfinancial.com with your name and phone number to receive a custom meeting link.

Contact Harty Financial with any questions at 978-972-5961

or at info@hartyfinancial.com

Caleb Harty is a principal at Harty Financial and holds the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. He has his B.A. in Economics from Gordon College in Wenham, Mass., and is also a graduate of the National Outdoor Leadership School (NOLS), which he attended in the Yukon Territory, Canada. Caleb is also an Emergency Medical Technician (EMT) and volunteers with the Red Cross.

Caleb has a niche specializing in working with families that have a child with special needs. The connection is a personal one, as his brother-in-law has Down syndrome. He had been published in Forbes, Kiplinger, and Exceptional Parent.

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