



# NAMI Tri-Valley

## General Meeting

*Presents:*

**Stephen Dale, Esq., LL.M.**

***Dale Law Firm***

**Special Needs Trusts and ABLE  
Account with a Focus on Quality of Life**

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**Monday, October 4, 2021**

**7:00 p.m. to 8:30 p.m.**

**This presentation will be given on Zoom,  
to participate, please access the following link.**

Join Zoom Meeting

<https://us02web.zoom.us/j/83073437138?pwd=eGpEVmV4L1ZSQmxmUGpRU0RibTd2UT09>

Meeting ID: 830 7343 7138

Passcode: 058816

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Find your local number: <https://us02web.zoom.us/j/83073437138?pwd=eGpEVmV4L1ZSQmxmUGpRU0RibTd2UT09>

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Stephen Dale will discuss how Special Needs Trusts can be established to protect and assist the disabled while protecting their financial interests and eligibility. You will learn what to do to prepare for writing a Special Needs Trust (SNT). He will go through a simple 4-step process that will ensure you have a document that addresses all the issues and decisions that must be made in providing for your loved one with a disability. Mr. Dale will also discuss how ABLE accounts can be used in conjunction with a SNT or independently.

Stephen W. Dale received his JD from Armstrong Law School and his LL.M. in Taxation from Golden Gate University in 2001. The Dale Law Firm was established in 1992 in order to provide quality estate planning to clients by working cooperatively with the clients' tax, financial and insurance professionals.