



is Proud to Welcome

Patrick MacGrath



My name is Patrick R. MacGrath and I am the President and CEO of Private Wealth Management Group located in Appleton, Wisconsin. We are a comprehensive wealth planning firm that also specializes in Special Needs Planning. I have a sister with special needs. My sister Heather has soft Cerebral Palsy and Epilepsy. I know, first hand, how difficult it can be to not only plan for the future, but just get through the day. Early in my financial planning career, the disconnect between the traditional wealth planning model and the special needs planning world became evident. Our primary goal is to integrate the appropriate planning needed for financial security and Special Needs care assurance.

Disability Financial Planning Presentation

7 key steps to develop your Ultimate Special Needs Plan

Let's take a walk down Special Needs Planning Way, shall we? What is Special Needs Planning and why is it important? From my family's own experience with special needs planning to ensuring that my sister Heather's future is secure, this presentation will address seven key steps that will help you develop your Ultimate Special Needs Plan.



Two dates/locations to choose from:

Madison:

Saturday, June 8, 2019

1:00-3:00 PM

DreamBank
821 East Washington Avenue
Madison, WI 53703

Franklin:

Saturday, June 15, 2019

1:00-3:00 PM

Aurora Healthcare
9200 West Loomis Road
Franklin, WI 53132

Cost:

\$10 per person

(Scholarships are available if needed).

Contact Josh Escher at PWSA of WI, Inc. for further information and assistance at 1-920-733-3077

Registration

Online registration for this event is available:

<https://pwsaofwi.regfox.com/disability-planning-presentation>

Name: _____ Email: _____

Address: _____ City: _____

State: _____ Zip Code: _____ Phone: _____

SESSION ATTENDING: **Madison** Saturday, June 8, 2019

Franklin Saturday, June 15, 2019

AMOUNT ENCLOSED: \$ _____ (\$10 per person)

REGISTRATION DEADLINE: June 6, 2019

Please mail registration form and payment (made payable) to:

PWSA of WI, Inc. • P.O. Box 324 • Menasha, WI 54952 • PayPal may also be used for payment