MORICE GROUP FINANCIAL
CORDIALLY INVITES YOU TO COME AND LEARN ABOUT

WILLS & LIVING TRUSTS

An Estate Plan is vital for any individual, couple, or family that owns a home and has assets. Ensure that your Estate Planning is in good order by reviewing the methods families use to **avoid the delays and legal fees of Probate Court. Learn various methods and best practices to protect your family from unnecessary costs and wasted time in Probate**.

We'll cover the following topics, **in *easy to understand terms*:**

- The advantages and disadvantages of **Wills and Living Trusts**
- How **Powers of Attorney** work and don't work (some may not be valid if you are disabled or pass away)
- How **Probate Court** works and why you may want to avoid it for your family
- Why putting property in your children's names may be a mistake
- Common missteps by families raising children with challenges, disabilities or special needs
- Protecting your home from being swallowed up by the **Costs of Nursing Home Care**
- **Protecting your heirs' inheritance** from lawsuits, divorce and spend-thrifts
- Best practices for naming retirement accounts and Life Insurance beneficiaries
- How the new Secure Act affects your Trust and/or Retirement Accounts
- Learn about our "90 in 90 FORMula™" proprietary process

This seminar is designed to help you and your family avoid the most common costly mistakes.
Be our guest at this unique and FREE educational event. If married, spouses are encouraged to attend. Adults only.

Kindly call our 24-hour reservation line or RSVP online using the information below.

Dates, Times & Location

Tuesday	Thursday	Saturday
March 4th, 2025	March 6th, 2025	March 8th, 2025
1:00 pm - *or* - 6 pm	1:00 pm	11:00 am

PRAIRIE ACTIVITY & RECREATION CENTER (PARC)
24550 W Renwick Rd, Plainfield, IL 60544

Scan to RSVP

CALL **(877) 450-7787** (toll-free)
— *or* —
Register Online at **RSVPconnect.com**
and enter code: **019710**

Meet Your Hosts

Mike Morice

Mike Morice is a seasoned professional specializing in generational wealth strategies and estate planning. A proud graduate of Loyola University Chicago and former professional volleyball athlete, Mike has built a career dedicated to helping his clients secure their financial futures and build lasting legacies. Mike has empowered countless clients to navigate the complexities of estate planning, offering tailored guidance on trusts, wills, and investment strategies. Mike and his wife, Kate, reside in Plainfield with their two children, MJ and Lola. Mike is an avid reader and loves creating lasting memories with his family.

Kate Morice

Kate Morice is a dedicated professional with a history of generational wealth strategies, retirement planning, and estate planning. Originally from Wheaton, Kate is a graduate of Taylor University Indiana and former collegiate track athlete. Kate understands that building and preserving wealth requires careful planning, smart investments, and a clear vision for the future. Whether guiding clients through retirement planning, structuring tax-efficient wealth transfers, or implementing estate strategies that protect assets for future generations, Kate ensures each plan aligns with the client's personal and financial goals. Mike and Kate love traveling the world, trying new restaurants together, and spending time with their 2 children, MJ and Lola.

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MoriceGroup

INTEGRATED TRUST SYSTEMS
ESTATE PLANNING SINCE 1985

For educational purposes only – nothing will be sold at this seminar.
This class is not affiliated with Prairie Activity & Recreation Center and is offered independently.