

Press Release for
Senior Money Matters

Financial Topics for Seniors to be Discussed at Seminar

Roxboro, NC A free seminar series will be presented at Somerset Baptist Church in May entitled “The Senior Money Matters Series.” It will be presented at Somerset Baptist Church by Kingdom Financial Services in cooperation with the Generosity Initiative. Topics include a comprehensive explanation of Medicare including a free “Medicare Simplified” book. Also, learn your inheritance tax rate and receive a custom, personalized Estate Tax Analysis. Attendees can expect a discussion on strategies to increase income, decrease taxes, and reduce the risk of outliving their savings. A complimentary Lifetime Income Analysis report will be made available to all. This 2 session series will be held on Tuesday, 5/15/18 and Tuesday, 5/22/18 from 11:00 A.M. until 1:30 P.M. Lunch will be provided. To register, call the church office: 336-599-5345.

Free Seminar for Seniors

Roxboro, NC A free seminar series addressing 4 specific areas of financial concern for senior citizens will be hosted by Somerset Baptist Church. The “Senior Money Matters Series” discusses inheritance taxes, reducing income taxes, making sure your savings lasts your entire lifetime, and Medicare. Each attendee will receive a Custom Estate Tax Analysis including a Lifetime Income Analysis, as well as a “Medicare Simplified” report at no cost.

“The government mails out a 90 page guide to explain Medicare. I have found many people are more confused by it than enlightened,” says David Brunswick, one of the instructors. “This session is designed to help folks make sense of Medicare and their choices.” Topics include what Medicare does and does not cover, supplements, and the Part D prescription drug program.

In regard to inheritance taxes, most people are aware of the Federal estate tax, but even though North Carolina has no estate tax it is one of the most expensive states in which to die. Senior Money Matters outlines strategies to make these taxes optional.

“If you are concerned with outliving your money, you need to attend,” says Robert S. Cathcart, executive director of In His Steps Foundation, which is a co-sponsor of the Senior Money Matters Series. “People will learn how to increase income, decrease taxes, and in some cases help their favorite ministry at the same time,” Cathcart claims.

Senior Money Matters is a 2 session series and will be held at the church which is located at 141 Somerset Church Rd. in Roxboro. Session I is scheduled for Tuesday, May 15, 2018 and session II is scheduled for Tuesday, May 22. Attendance at both sessions is recommended. Times are from 11:00 A.M. until 1:30 P.M. Lunch will be provided. Register by calling the church office at 336-599-5345. Seating is limited so you must register by Friday, May 11. The cost is free.

Senior Money Matters is presented by Kingdom Financial Services in cooperation with The Generosity Initiative.