

SPEAKER TOPIC REQUEST FORM

BY FILLING OUT THIS FORM, YOU ACKNOWLEDGE:

- **This is an informational session. NO LEGAL ADVICE IS PROVIDED. No advice will be provided on how to prepare legal documents or go through a legal process without an attorney.**
- **There is no attorney-client relationship between the speaker and participants. Information discussed in a group setting is generally not confidential.**
- There is no guarantee that a particular speaker will be available. There is (currently) no fee for this program, so these professionals are volunteering their time to provide valuable information to the community.

1. How many participants are you expecting to attend (minimum of 6 required): _____
2. What is your minimum/maximum time allotment for the presentation? _____
3. Preferred dates/days of week/months & time of day: _____

SPEAKERS

Estate Planning and Probate Attorney (choose 1-2 topics)

- ☐ General overview of estate planning and probate (Wills, Trusts, Powers of Attorney, Texas probate process, etc.)
- ☐ Estate planning for parents of young or incapacitated children
- ☐ What adult children need to know about their parent's estate planning needs
- ☐ Common issues and myths related to estate planning and probate
- ☐ Estate planning for small business owners
- ☐ Custom presentation or Q&A on specific topic (please be specific): _____

Optional Second Speaker (choose up to one topic)

Financial Advisor

- ☐ General overview of retirement planning
- ☐ Life insurance and long term care insurance
- ☐ Products and investing for small business owners
- ☐ AFLAC for small businesses

Tax Preparer/CPA

- ☐ Pass-through LLC vs. S-Corp
- ☐ Tax issues related to debt forgiveness (including student loan Income-Driven Repayment)
- ☐ Tax issues related to deceased family members

Property/Casualty Insurance Agent

- ☐ Protecting assets/legacy from unanticipated losses, accidents, or lawsuits
- ☐ What small business owners need to know about insurance

Realtor

- ☐ Issues related to selling a house when an incapacitated or deceased person is on the deed

Tax Attorney

- ☐ Dealing with a big tax bill you can't afford

Care Manager

- ☐ Services available for families who need help managing care for a loved one, finding quality professionals, etc.

Home Security Professional

- ☐ Creative strategies to assist with independent living at home

Other

- ☐ _____

Any questions you would like to ask in advance to ensure the presentation is tailored to the information your group is most interested in? Please be specific. Your group may compile a list of questions and submit them to amber@ramseylawtexas.com up to 7 days prior to your scheduled presentation. If you do not receive confirmation of receipt, call 210-910-8431.

- ☐ We will submit a list of questions 7 or more days prior to the scheduled presentation
- ☐ We have the following questions:

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This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

- ☐ By checking this box, I confirm that these participants have authorized Ramsey Law, PLLC to send an invitation to this event.