



DATE

November 5, 2025

TIME

12:30 PM - 1:30 PM

LOCATION

Smithtown
Historical Society
Brush Barn Building
211 East Main Street
Smithtown, NY

PLAN TODAY, THRIVE TOMORROW:

How to Protect Your Home and Assets with Strategic Planning



Aaron E. Futterman, Esq., CPA



Futterman Lanza, LLP
ELDER LAW & ESTATE PLANNING



James Verdi, CFP®, President

**SYNERGY
WEALTH STRATEGIES**

For many of us in and near Smithtown, our home is more than just a place to live—it's the foundation of our family's financial security, often worth close to or even over a million dollars. What steps have you taken to protect it from the single biggest threat to your life's savings: the staggering cost of long-term care?

Join Aaron Futterman, Esq., CPA, Elder Law and Estate Planning Law Partner at Futterman Lanza, LLP and James Verdi, CFP, President at Synergy for a complimentary "Lunch and Learn" event. We will provide a clear roadmap for families who want to protect their hard-earned assets.

This is a presentation and community discussion about securing your future. You will learn:

- The #1 Threat: Understand the real costs of long-term care on Long Island and the strict rules of New York Medicaid.
- Protecting Your Home: Learn about effective legal strategies and why simply putting your child's name on the deed can be a catastrophic mistake.
- The 5-Year Lookback: Discover the critical importance of the Medicaid "look-back" period and why the best time to plan is now.
- Beyond the House: How to coordinate your retirement accounts (IRAs, 401ks) and other investments that intersect with your legal plan.
- Planning for All Ages: Younger attendees will learn about essential advance directives, while retirees/soon to be retirees can get ahead of the latest trends and legal changes.

RSVP: Sharyn at 631-979-4300
or somara@trustedattorneys.com