



MONEY SMART WEEK®

April 21 - 28

Money Smart Week® is coordinated by the Federal Reserve Bank of Chicago in partnership with The American Library Association. Its mission is to promote personal financial literacy.

When You're 65: Protect Your Retirement

Monday, April 23, 1:00 pm

Make informed financial investment choices regarding your retirement assets. Rajan Shah, of Secure Capital Management and Secure Retirement Radio @ 560AM WIND, discusses planning for retirement, investment and expense strategies, protecting your investments, and more. [Please register.](#)

Making the Most of Social Security

Tuesday, April 24, 7:00 - 8:30 pm

Join Mike Heatwole, Financial Advisor with Waddell and Reed, to learn about alternate filing options available to married couples and divorced and widowed individuals, that often provide monthly lifetime social security payments higher than the standard filing options that are typically selected. [Please register.](#)

Creating a Charitable Giving Plan

Wednesday, April 25, 1:00 - 2:30 pm

Edward Jones Financial Advisor Yev Kozachuk discusses evaluation techniques to choose a charitable organization to match your passion, that will use your donations wisely. He will also share ways to incorporate your wishes into your financial plan without sacrificing your lifestyle. [Please register.](#)

Budgeting, Spending and Saving

Wednesday, April 25, 7:00 - 8:30 pm

Marisol Wallscetti of Village Bank and Trust of Prospect Heights will help people of all ages to develop a personal budget, create a spending and savings plan and offer tips on how to successfully execute them. [Please register.](#)

Estate Planning Toolbox

Thursday, April 26, 7:00 - 8:30 pm

Certified financial planner and educator Karen Chan will discuss a range of estate planning tools and what they do. We will discuss wills, trusts, powers of attorney, the role that insurance, titling of property, and gifting can play and how these tools work with our tax system, including estate, income, generation-skipping and gift taxes. [Please register.](#)

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