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Texas Credit Unions.



WHEN: Tuesday, November 15th, 2016

TIME: 5:30 p.m. - 6:00 p.m. Social
6:00 p.m. - 6:30 p.m. Dinner
6:30 p.m.- Program

WHERE: Embassy Suites Hotel, 7750 Briaridge, San Antonio, TX 78230

MENU & MEAL COST: Sliced Marinated Beef, Au Jus, Garlic Mashed Potatoes, Seasonal Vegetables and Warm Dinner Rolls with Sweet Cream Butter. Dessert: Strawberry Shortcake

\$25 if reservation is made by Friday, Nov 11th /\$27 if reservation is made after Friday, Nov 11th ***Half price for credit unions with assets between \$3-10 million (limit 1); ***Reservations made receiving complimentary or reduced pricing will be charged the full price if not in attendance*

PROGRAM: “Non-Probate Transfers: Account Issues at Financial Institutions.”
By David West, Board Certified, Civil Trial Law, Texas Board of Legal Specialization

Description: In this session, you will learn about POA’s, misapplication of fiduciary property, living trusts, guardianships, protecting the elderly, JTWRROS accounts, estates and review of account statements. The focus is that many people don’t want to go to probate court. They do their estate planning through financial institutions. This places a much greater burden on financial institutions.

****We are accepting can goods and toys to benefit The Children’s Hospital of San Antonio****

RESERVATIONS: Online reservations at www.alamoccu.com/meetings or
Rosanne Hernandez rosanne.hernandez@unitedsafcu.org (210) 561-4504 fax

Please make checks payable to: Alamo Chapter of Credit Unions. Bring your check to the meeting or mail to: Alamo Chapter of Credit Unions, P.O. Box 791841, San Antonio, Texas 78279-1841.

Number of individuals who will be attending dinner/meeting: _____

Name of Credit Union/Organization: _____

Individual making reservations: _____

Phone Number and Email: _____