

WILLS, ESTATE & RETIREMENT PLANNING

VIRTUAL BRIEFCASE



INVESTMENTS / RETIREMENT / LONG-TERM CARE

<https://www.hartwealthstrategies.com>



ESTATE PLANNING

<https://www.elsasmithlaw.com>

TAXES

<https://www.irshelpattorneys.com>

CREDIT

<https://www.operationhope.org>
(Contact: sonya.dease@operationhope.org)

<https://www.mecu.com/Learn>

MORTGAGES

<https://www.nfmlending.com/loanoriginator/marcus-nole/>

FINANCIAL TOOL KITS

<https://www.sec.gov/investor/pubs/toolkit.htm>

<https://macatawabank.com/personal/how-to/financial-planning-toolkit>

<https://familyreach.org/downloads/financial-planning-toolkit/>

https://files.consumerfinance.gov/f/documents/cfpb_your-money-your-goals-toolkit_2018-11_en_ADA.pdf

WEBINAR PRESENTERS



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