

# FINANCIAL PLANNING FOR WRITERS

## moderated By Eric Estrin

This workshop provided our writers with valuable strategies to enable them to take control of their financial future, including:

- How to maximize Social Security benefits for singles and couples. At what age should you begin to collect? What about your spouse?
- What are the various kinds of annuities, and how can they be used to supplement Social Security and pensions? How much do you need to fund them? Will your money be tied up forever? What kind of returns should you expect, and when can you begin to take distributions?
- Other ways to build wealth for retirement, and how to protect it from risk and unnecessary taxation
- How to launch a lucrative side-career, while maintaining your primary focus as a writer
- What to expect from health care in the Trump Era. How to get the most out of Medicare, whether or not you're covered through the WGA or another plan
- What are the costs and benefits of owning a long-term care health plan? How do these plans work?
- What's the difference between a will and a trust? What about a conservatorship? How they can help minimize future legal hassles and expenses, and how to set one up for yourself and/or those you love
- How to ensure that your wishes are met through an advance health care directive



**Tina Dickinson** has been in the financial services industry for more than 25 years. She currently works as Senior Marketing Director with World Financial Group and Revolution Financial Management, and as an Investment Advisor and Branch Office Manager with Transamerica Financial Advisors. Bouncing between her offices in San Clemente and Westlake Village, CA, she specializes Individual and Company Health and Wealth Management with a focus on insurance (Life, Health, Medicare, Disability, Long Term Care and Final Expense); retirement (401K, all IRAs, Annuities, Mutual Funds); and business (Executive Compensation Plans, Business Continuation and Retirement Plans).



**Susie Hattan** is an attorney specializing in estate planning. She strives to provide certainty, clarity, and peace of mind for her clients by helping families effectively express their intentions and protect what they have. Susie also volunteers her time through the Educating Seniors Project, sponsored by the Trusts and Estates Section of the California State Bar, which informs seniors, their families, and the community about laws and resources for protection against elder financial abuse. S



**Matt Homa**, Regional Vice President Prudential Annuities, has had extensive success working in annuity sales for four large financial service providers across the country. As an expert in retirement income strategies, he will be presenting information on both annuities and Social Security.



**Eric Estrin** is a long-time TV writer/producer, former Treasurer of the TV Writers Fund for the Future, and currently an investment advisor representative with Transamerica Financial Advisors.