HUGHES | FINANCIAL SERVICES, LLC

HUGHES FINANCIAL SERVICES, LLC

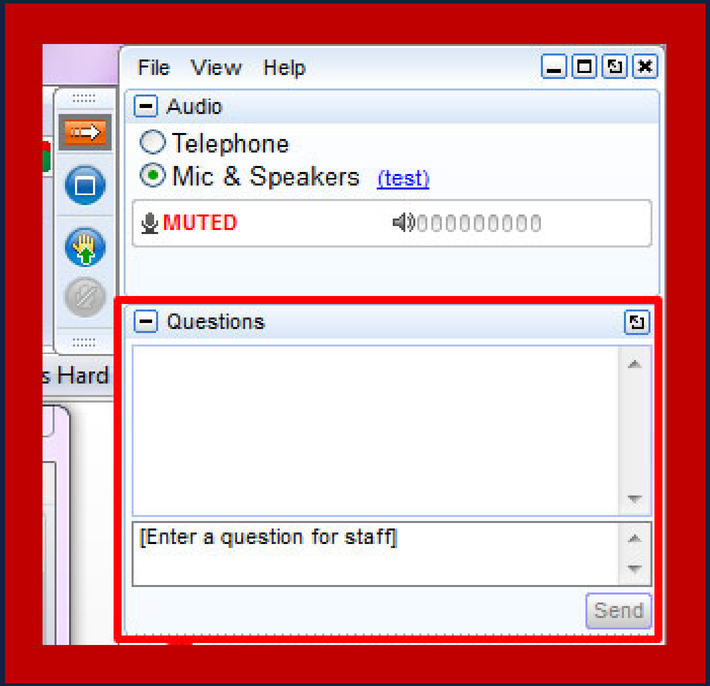
WEDNESDAY LUNCH & LEARN

Estate Planning in 2021

A How-To on Protecting Your Assets and Providing for your Loved Ones

Q&A

HAVE QUESTIONS?



ABOUT HUGHES FINANCIAL SERVICES

RIA

Independent Registered Investment Advisor

Comprehensive financial planning and wealth management

Fiduciary

Professional certifications and continuing education

Over 90 years combined experience

TODAY'S SPEAKERS

SCOTT HUGHES, CFP®, MBA
Managing Partner & Financial Advisor

MARTHA SOTELO, ESQ.
Principal, Vaughan, Fincher & Sotelo, PC

Why is having an estate plan essential?

What is the difference between a will and a trust?

Where would you start when creating an estate plan?

Who are the key people – or Fiduciaries – in an estate plan and what do they do?

How often should you review or update your estate plan?

Currently, the estate tax applies to individuals with a net worth of $11,700,000 and for married couples, $23,400,000.

What assets are included in that amount?

Are the exemption amounts going to change?

What has changed in the estate planning world recently, especially in light of the COVID-19 pandemic?

What is the biggest mistake you see when it comes to estate planning for families?

Should adult children have their own estate plan?

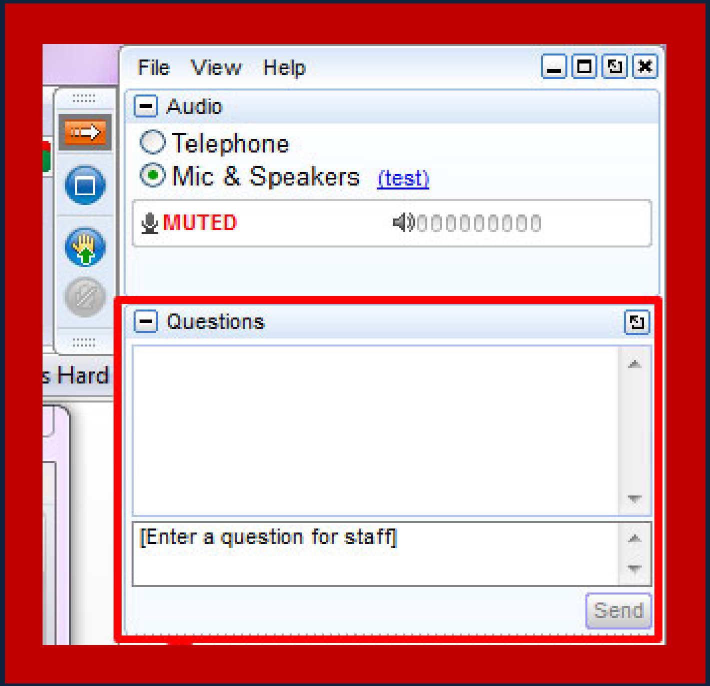
Martha Sotelo, Esq. | Principal, Vaughan, Fincher & Sotelo, PC

TYSONS OFFICE
8609 Westwood Center Drive, Suite 400
Vienna, VA 22182
(703) 506-1810

LEESBURG OFFICE
602 South King Street, Suite 201
Leesburg, VA 20175
(571) 209-5740

www.vfspc.com

Q&A



HAVE QUESTIONS?

Hughes Financial Services will be hosting **20-minute virtual educational Lunch & Learn sessions** during which we'll do a deep dive on an array of financial planning topics. Grab your device and lunch and join us each **Wednesday at 12:00 pm** to juice up your financial planning knowledge!

WEDNESDAY
LUNCH &
LEARN

WEDNESDAY, MARCH 3rd
Estate Planning in 2021 with Guest Speaker Martha Sotelo, Esq., Principal, Vaughan, Fincher & Sotelo, PC

WEDNESDAY, MARCH 10th
Tax Planning in 2021: What to Expect & Plan For with Guest Speaker Liz Nuti, President, Accounting & Tax Solutions, Inc.

WEDNESDAY, MARCH 17th
ESG Investing: What is it and should you consider it in your financial plan?

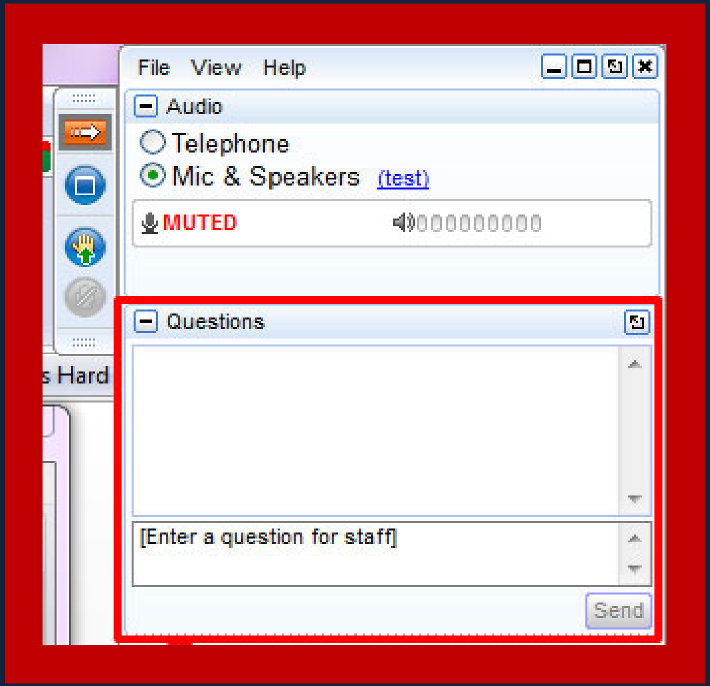
WEDNESDAY, MARCH 24th
The 2021 Plan to Protect Yourself Against Identity Theft and Cybercrimes

WEDNESDAY, MARCH 31st
The Many Ways to Invest in Real Estate

WEDNESDAY, APRIL 7th
2020 Was the Year of the Roth – What About 2021?

REGISTER ONLINE AT WWW.H4FS.COM

Q&A



HAVE QUESTIONS?

HUGHES FINANCIAL SERVICES, LLC

If you have questions about this presentation, please contact us at:
(703) 669-3660 or clientservices@h4fs.com

Hughes Financial Services, LLC, is an independent Registered Investment Adviser (RIA) that works closely with individuals and families, helping them to accomplish their unique financial goals through the allocation of their assets. We are a fee-only firm that seeks to adhere to the highest fiduciary standards and provide clients with advice that is truly unbiased and has only our clients' best interests in mind.

We offer our clients an impressive wealth of expertise in retirement and estate planning, investment and risk management, insurance, and education planning. Our advisers hold a variety of professional designations and certifications and are well versed in a number of financial disciplines. Our combined education and experience allows us to proudly offer you independent financial advice that you can trust.

2201 Cooperative Way ▪ Suite 150 ▪ Herndon, VA 20171
(703) 669-3660 ▪ FAX (703) 880-4905 ▪ www.h4fs.com

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