



Wealth, Health & Aging Symposium

SEPT. 25, 2019 • 6:30 PM

J LIU WORTHINGTON
6880 High St. | Worthington, OH 43085
drinks & hors d'oeuvres served

Register you and a friend by email: Tiffany@LibertasWealth.com or 614.543.1350



Geoff Kunkler, Esq.
**Estate Planning 101:
Why Every Adult Needs
an Effective Plan**



Adam Koos, CFP®, CMT®
**Retirement Planning for
the 2020s**



Jeanna McElroy
The Art of Aging Well



SENIORITY
BENEFIT GROUP

Matt Kerr
Get Medicare Ready



Dan Damceski
Social Security 101



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Meet the Speakers

Geoff Kunkler, Esq.

Geoff is an estate planning attorney, partner, and Chartered Advisor in Philanthropy™ (CAP) at Carlile Patchen & Murphy. He has been named one of Columbus' Top Lawyers by Columbus CEO Magazine, is listed as one of Ohio Super Lawyers magazine's "Rising Stars," and is rated "AV Preeminent®" by Martindale-Hubbell®, Marindale's highest peer rating for ethical standards. Geoff received his undergraduate and master's degrees from Case Western University, and his law degree (J.D.) from The Ohio State University Moritz College of Law.

Adam D. Koos, CFP®, CMT®

Adam is a CERTIFIED FINANCIAL PLANNER™ professional who has been named one of Columbus' "People to Know in Finance" by Business First, is one of Investopedia's Top-100 most influential financial advisors in the country, and is one of only 3,481 Chartered Market Technicians worldwide. He is an accomplished speaker and writer, as well as the founder, president and portfolio manager at Libertas Wealth Management Group, Inc., a recipient of the Better Business Bureau Torch Award for Ethical Enterprising.

Jeanna McElroy

Jeanna McElroy is a Certified Geriatric Care Manager, a member of the National Association of Professional Geriatric Care Managers (NAPGCM), the Ohio Guardianship Association, and founder of Senior Support Services. She graduated with honors from Wittenberg University with degrees in both Sociology and Psychology and earned her certification in Care Management from the National Academy of Accreditation for Care Management.

Matt Kerr

Matt Kerr is a Benefit Advisor at Seniority Benefit Group located in Dublin, Ohio. SBG is a Medicare guidance firm that works with beneficiaries turning 65 or planning to retire.

Dan Damceski

Dan Damceski is the Staff Assistant/State Liaison for the Social Security Administration in the Columbus Metro and surrounding areas. Dan began his career with Social Security in 2005 as a Claims Representative, shortly after graduating from the Ohio State University with a B.A in Economics. Dan's time as a Claims Representative and Operations Supervisor has helped him gain knowledge in all Social Security programs and benefits, including retirement, disability, Medicare, and Supplemental Security Income (SSI).

