



The NALLI-ELIAS EDGE

ISSUE 1 - Fall 2023



Your Source for ESTATE PLANNING - ELDER CARE LAW & ADMINISTRATION - WILLS - TRUSTS

ESTATE PLANNING FEATURE

4 Ways to Protect Yourself When Self-Employed.

Whether you're an independent contractor or sole proprietor, you work hard and need a solid plan to ensure you, your business endeavors, and loved ones are properly protected.

Being **self-employed**, the foundation of your plan is key and should include considerations involving **retirement accounts** and various **insurance options** [life, disability, and business] — they need to work in tandem. Other planning considerations include actual retirement or if you become incapacitated or die. Every life decision comes with a certain amount of risk — being self-employed is no exception.

Here are four (4) ways to protect yourself:

- 1.) OPEN A RETIREMENT ACCOUNT.
- 2.) PURCHASE ADEQUATE INSURANCE.
- 3.) CREATE A COMPREHENSIVE ESTATE PLAN.
- 4.) HAVE OPERATING DOCUMENTS FOR YOUR BUSINESS.

You have a lot on your plate and you may have some of these components in place. However, working together with our Team on a **comprehensive Estate Plan**, we can help protect your future and your loved ones.

Schedule your appointment today: 724-375-4005.

HAVE YOU ATTENDED OUR SEMINARS?

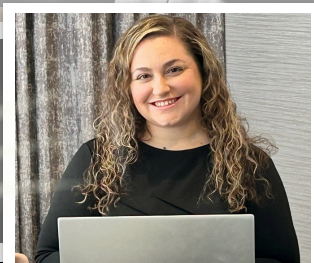


In October 14, 2022, we hosted our first seminar at the Hilton Garden Inn - Monaca, PA, based on feedback from clients and their family members encouraging us to share more information relating to Estate Planning and Elder Care Law. Attendance was incredible and the questions we fielded were extremely beneficial for all attendees.

Since that time, we've hosted quarterly informational seminars. Content includes Asset Protection, Elder Care Planning, Trusts, Probate, and more. If you have friends or family who have not attended, please have them join us in the future. Registration is simple and they will walk away with solid information from our Team.

Interested in learning more?
Please call our office @ 724-375-4005.

EMPLOYEE SPOTLIGHT



Meet Jocelyn Sudar, Assistant to Counsel

As Assistant to our Attorneys, Jocelyn's primary roles include onboarding new Clients and opening new Estate Planning and Trust files. Hard-working, knowledgeable, and client focused, Jocelyn will join us as a full time Attorney upon graduation from Duquesne Law School next Spring.

NEVER BE UNPREPARED.

"SUCCESS IS WHERE PREPARATION AND OPPORTUNITY MEET." - BOBBY UNSER



NALLI, ELIAS
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