

## NEXTWAVE

### PRESENTATION DETAILS

Thursday November 14, 2019

Light Snacks & Refreshments  
6:30 - 7:00 PM

Discussion & Networking  
7:00 - 8:30 PM

#### Location

Newport Private Wealth  
469 King St West, 4<sup>th</sup> Floor

### YOUR HOSTS



**Caitlin Chapman, CFA**  
Portfolio Manager  
416.867.7534



**Amélie Beauregard**  
MBA, CIM®  
Associate Portfolio Manager  
416.867.8599

### GUEST LAWYER



**Heela Donsky Walker**  
B.A., J.D., TEP  
Associate at Robins Appleby  
Advises clients on all aspects  
of trusts and estates law

### NEXTWAVE SEMINARS

Newport Private Wealth's *NextWave* seminars prepare young professionals to become educated and better stewards of wealth. In addition to providing wealth management insights and strategies, networking is at the forefront of the events as attendees make connections and exchange ideas with like-minded peers.



## YOU'RE INVITED TO - A POA PARTY! A Power Of Attorney Party

POAs and estate planning are not typically hot topics for those in their 20s and 30s. While we agree that planning for the unthinkable is not the most fun task, it is an important consideration as you take steps to manage your overall financial affairs. Let us help you take this one off your to-do list.

As a group, we will engage in broad discussion about estate planning but from the perspective of someone in their 20s and 30s. We'll share stories and answer your questions together with Heela Donsky Walker, an experienced and trusted estate planning lawyer.

With her guidance, you will prepare a personalized and legally binding POA document. You'll execute (a.k.a. sign), a Newport representative will act as a witness, and together we will pop champagne to celebrate your new found peace of mind that the right person will care for you in the unlikely event you can't make decisions for yourself.

### POWER OF ATTORNEY FACT OR FAUX?

- Fact:** A POA is a document which gives another person the legal authority to act on your behalf for legal, financial or health related decisions, depending on the terms of the POA.
- Faux:** A Power of Attorney is for the old and wealthy.
- Fact:** If you're incapacitated without a POA and you're over the age of majority, the process to appoint a decisionmaker could drain family and friends of time and money at a difficult time.
- Faux:** A POA is a substitute and equivalent to a will.
- Fact:** Unless there is a POA, there is no guarantee that doctors share medical details with parents or spouses even in the event of an emergency.
- Faux:** Signing a POA is a forever document and difficult to update.

### PLEASE RSVP

Casual attire. Space is limited and will be reserved on a first come, first serve basis. Reply to [nextwave@newportprivatewealth.ca](mailto:nextwave@newportprivatewealth.ca)