



Dear Friends, Colleagues, and Polk-County Neighbors -

We appreciate having the opportunity to serve our community and your organization's members by assisting with lunch & learn or other educational events. Here at The Tessier Law Firm, P.A., we truly do try to help our clients – and our community – ***“Take Charge of Life's Transitions!”*** We offer our neighbors and business partners across Polk County the opportunity to learn all about Estate Planning, Probate, and Elder Law issues in Florida, including why folks in any stage of their life's journey would need a Will, Trust, Advanced Care Directive(s), Powers of Attorney. We also help them plan for future illness or incapacity by providing guidance on Long Term Care and caretaking issues, and Medicaid planning. Whether our audience is new to Florida, or have lived here for many years, we can deliver valuable information that can change lives – and we hope we were helpful.

We are currently building out our SPEAKING ENGAGEMENT calendar for 2025, and are offering our local civic organizations, 55+ communities, public gathering places and other interested groups a variety of presentations that can be beneficial across all of these audiences. As we are offering our attorney time for the educational presentation at no cost to you, we do not generally pay the organization for space – however, we are happy to bring donuts, a raffle prize, and many bonus giveaways to attract attendees, new friends, and make it a FUN educational experience!

We love entertaining as well as teaching, we are able to adjust the tone of our seminars to the audience, many of our presentations are lighthearted and we've gotten great feedback that they were enjoyable. We can also adjust the time. We generally speak for a minimum of 20 minutes, with 30-45 minutes being the average for a session, depending on Q&A. We also offer public lunch and dinner seminars at local restaurants that go more in depth into our estate planning topics that are 75-90 minutes, and can offer endorsed seminars where we pay for lunch or dinner for a more targeted group (with a minimum of 20 attendees).

Our list of additional Seminars is attached, with a basic description of the topics covered. If you are interested in having a speaker for an event in the next few months, either LIVE or via WEBINAR, **please contact me on my personal cell (413)219-4525) or email, DeniseTessier@tessierlawfirm.com, or reach out MICHELE CAGE, our Marketing Manager at our office at (863) 220-7927; MicheleC@tessierlawfirm.com to arrange a convenient date/time or a follow up call.** If you know of any other groups or organizations that would benefit from these educational sessions, please do pass this information along.

Thank you, and have a great summer season !

Kind Regards,

Denise Tessier, Esq.

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SAMPLE EDUCATIONAL PRESENTATIONS 2025

Title	Description	Estimated Time
FL Wills and Trusts 101 – What you Need to Know !	Our signature legacy wealth planning seminar, typically suitable for a lunch or dinner. Ask about current local offerings; WEBINAR version available.	75-90 minutes, can be scaled down a bit if needed. Takeaway workbook provided.
Dumber than Florida Man? Top Estate Planning Mistakes to Avoid!	Lighthearted introduction to some of the top mistakes that people make in their estate planning, the take away for attendees is usually a VIP invitation to the longer seminar. Perfect for Coffee Hours, filler or introduction to other speakers.	20-30 min minimum, can go to 45 depending on audience
All You Need is Love – And An Estate Plan	A mini version of our FL estate plan seminar, with a “Beatles” Theme. Introduction to some of the basic estate planning and Florida Law concepts.	About 30 min., can be followed by Q&A
Estate Planning is Out of this World ! or Addams Family Values IV – Leaving a Legacy	What do estate planning attorneys DO? We have two entertaining presentations available with an intro to some of the basic information re: estate and advanced directives, using “case examples” and scenarios - one with a Star Wars Theme (May the 4 th be With You!), and one with an Addams Family Theme (great for Fall /October time frame).	Generally 30-45 minutes.
Maximizing your Money Mindset - a Workshop for Women	Perfect for women’s groups (and partners) – Theme is How to NOT be AFRAID of Money, and how to change your mindset around managing finances. Often given to 55+ groups with single or widowed women who were raised in an environment where they were not taught financial basics but are now managing along. Format is generally an interactive workshop covering multiple topics on a basic level, can be run in conjunction with other providers such as financial planners, insurance agents, mortgage/ real estate experts as needed. We can tap into our network to customize for your group.	Minimum one hour. Ideal is at least 2 to 3 hours, we’ve also done a three or four-part series with multiple sessions on financial planning, insurance, and protecting the home as an asset. A takeaway workbook is provided.
Trustee School	A walkthrough of what a Trust is, how they operate, and the basic responsibilities when someone is a Trustee, particularly beneficial for family members that are Trustees for someone else’s Trust.	45-60 minutes, can also be done workshop style with more detailed forms for record keeping and accounting

Title	Description	Estimated Time
What to Do When a Loved One Dies in Florida	Information about the steps to take in the days, weeks and months following a death in the family. Outlines the Probate process, practical steps to take with the home, and preventative steps to avoid probate and make the process smoother for the family	Flexible 30 to 60 minutes depending on audience
The FL Homestead Act – Not just a Tax Deduction !	Helpful info about one of Florida's best kept secrets – the Homestead Act protects you from LIABILITY and prevents your home from being taken away! Particularly good for new movers to the state as well as real estate agents. Applicable to both deed properties as well as manufactured homes.	15-20 minutes generally
Aging in Place? Key Resources in Polk County	Our Law Firm works with Sonshine Elder Advisors, a local geriatric care manager, to sponsor their Aging Resource Guide . We can discuss various types of resources for seniors that people may not know about – from transportation to assistance with scams. This informative presentation may be presented by our staff or we can host Sharmalee Jones of Sonshine Elder Advisors	30-60 minutes flexible, takeaway is the Aging Resource Guide , available hardcopy or electronically.
Planning for the Future –Your Key Life Documents	Many people think estate planning is only about what happens when you die – but most people need a plan for when they become ill or incapacitated, or when they need to care for a family member that has physical or mental challenges. Our class has an overview of the 4 major Key Life Documents that every person should have in place BEFORE they are ill: The financial durable Power of Attorney, a Health Care Surrogate Agreement, a Living Will, and a HIPAA release. We will also cover how to pass on any special instructions for Health Care decisions, and how a Do Not Resuscitate Form works (DNR)	30-45 minutes, takeaways can be provided
The Art of Giving - Crafting Your Charitable Legacy	Many people want to give to charity, but have no idea where to start. This presentation will guide charitable minded individuals through the process of deciding how much to give to charity, financial and non financial benefits, and more ! Perfect for Trust companies who want to start educating more of the public on the charitable trust benefits.	30-45 minutes, printed materials available
Keeping your Kicks after age 66 – the Long Term Care Roadmap	Long term care planning is a journey, not a single destination. Learn about how advance planning can set a clear roadmap through the twists and turns of aging and dealing with injuries and incapacity, to age gracefully at home as long as possible	45 minutes estimated, Guide available



HELPFUL PUBLICATIONS & RESOURCE GUIDES

Sample Printed Guides Available as Printed Copies or Electronically

1. Florida Long Term Care & Estate Planning
2. Relocation Guide: Estate Planning Considerations when Moving to Florida
3. Florida Probate Guide
4. 104 Questions Asked at Seminars
5. Your Polk County Aging Resource Guide (Polk/Florida)
6. Your Charitable Legacy Giving Guide
7. Florida LLCs and Investment Property Guide
8. What to do When a Loved One Dies
9. How to Transfer a Car in FL (when the owner dies)
10. What To Do with a Loved Ones Social Media When they Die
11. The Florida "Lady Bird Deed" – Explained
12. Questions for Interviewing a New Investment Advisor or Trustee

SEND REQUEST FOR COPIES TO:

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