

Helpful Financial Wellness Resources

PROVIDED BY

The Estate Planning Council of Cleveland

Estate Planning Council of Cleveland Membership Directory

www.epccleveland.org/members/directory

This page offers a full listing of the members of the Estate Planning Council of Cleveland, sortable by professional practice area. The Estate Planning Council of Cleveland is a membership organization that is a member chapter of the National Association of Estate Planners & Councils.

National Association of Estate Planners & Councils, Find an Accredited Estate Planner® Designee

www.naepc.org (use “find an AEP®” in the Quick Links Section”)

The estate planning professionals who appear in this searchable database all hold the Accredited Estate Planner® (AEP®) designation, awarded and administered by the National Association of Estate Planners & Councils. By selecting an estate planning professional who holds the AEP® designation, the public can be sure that he or she will practice within the team environment of estate planning while incorporating the knowledge, skill, expertise, and experience of his or her professional discipline to provide a personal, yet comprehensive, estate plan.

Cleveland Metropolitan Bar Association Lawyer Referral Service

<http://www.clemetrobar.org/LRS/> · 216-696-3532

The Cleveland Metropolitan Bar Association’s Lawyer Referral Service assists members of the public - who are seeking and expecting to pay for legal representation - in consulting a credible, experienced lawyer regarding a potential legal problem.

The Legal Aid Society of Cleveland

<https://laslev.org/get-help/get-help/> · 888-817-3777 or 216-687-1900

The Legal Aid Society of Cleveland provides free legal advice and representation to low-income people for civil matters in five counties in northeast Ohio: Ashtabula, Cuyahoga, Geauga, Lake, and Lorain. To get help from Legal Aid you can browse topics their website to learn about legal issues, call the Legal Aid Intake Line at the phone number listed above, or go to a brief advice and referral clinic near you. Legal Aid does not handle criminal cases or traffic violations.

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Taxes

American Association of Certified Public Accountants “360 Degrees of Taxes” Program

www.360taxes.org

This site is a national volunteer effort of the nation’s Certified Public Accountants to help consumers understand their taxes. 360 Degrees of Taxes has everything for tax season and beyond, all for FREE! This site, designed by CPAs, is here to help the viewer find tax resources, tips, FAQs, checklists and much more.

Internal Revenue Service Taxpayer Advocate Service

<http://www.taxpayeradvocate.irs.gov/about-tas> · 877-777-4778

The Taxpayer Advocate Service (TAS) provides many types of tax help for individuals. In this section, you will find information and resources for many of your tax-related questions and concerns.

American Association of Certified Public Accountants “Feed the Pig” Program

www.feedthepig.org · 888-777-7077, option 9

This site is here to help the public do just that, feed your piggy bank. Visitors will find helpful tools, articles, tons of tips and other resources to help them on their path to financial stability. It will help the viewer think through spending and saving habits, identify ways to start saving, and commit to making changes that will reduce debt and grow savings.

American Association of Certified Public Accountants “360 Degrees of Financial Literacy” Program

www.360financialliteracy.org

This site is a free service offered by CPAs to help Americans understand their personal finances through every stage of life.

CFP Board of Standards “Let’s Make a Plan” Program

www.letsmakeaplan.org

Let’s Make a Plan is an integrated public awareness campaign that raises awareness of, intent to use and preference for CFP® professionals while stressing the value financial planning provides to individuals and families. It provides consumers with tools to find a CFP® professional in their area and gives them information and resources about financial planning.

Financial Planning & Stability

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Senior Services
Medicaid, Social Security, Insurance

Ohio Department of Medicaid

<http://medicaid.ohio.gov>

Social Security Administration

www.ssa.gov

My Social Security.gov

<http://www.ssa.gov/myaccount/>

You probably plan to receive Social Security benefits someday. Maybe you already do. Either way, you'll want a my Social Security account to keep track of your earnings and verify them every year, get an estimate of your future benefits if you are still working, get a letter with proof of your benefits if you currently receive them, and manage existing benefits, including changing your address, starting or change your direct deposit, etc.

Life Happens

www.lifehappens.org · 888-543-3777

Life Happens is a nonprofit organization dedicated to helping Americans take personal financial responsibility through the ownership of life insurance and related products, including disability and long-term care insurance. Life Happens also seeks to remind people of the important role insurance professionals perform in helping families, businesses, and individuals find the insurance products that best fit their needs. Life Happens does not endorse any product, company or insurance advisor. Its only interest is seeing that consumers get the coverage they need to protect themselves and their loved ones.

AARP

General: www.aarp.org

"Money" Section: www.aarp.org/money

AARP is a nonprofit, nonpartisan organization that helps people 50 and older improve the quality of their lives. The "Money" section of their website offers six areas of interest: living on a budget; managing debt; saving and investing; taxes; scams and fraud; financial services; and retirement planning.

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The Estate Planning Council of Cleveland is providing this list as a public service. It is not intended to provide legal or financial advice and does not create a client relationship between you and the Estate Planning Council of Cleveland or its members.