



For Immediate Release

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Contact: Vivian Po, (415) 554-5502

***** PRESS RELEASE*****

**IMMIGRANTS AND SENIORS FIND FAMILY WEALTH FORUM USEFUL
IN BUILDING THEIR FINANCIAL FUTURES**

San Francisco, CA – Close to 300 attendees participated in the 2nd Family Wealth Forum hosted by San Francisco's elected Assessor Carmen Chu at Abraham Lincoln High School on March 24, 2018.

According to the event report card, 133 families received one-on-one counselling session with financial experts, including estate planners (40%), Assessor's staff on ownership change (25%), tax experts (19%) and financial planners (16%). Among those families, 77% were 50 years old or above and 23% spoke a language other than English.

The trilingual workshop on estate planning, affordable homeownership opportunities and property tax savings were also very popular, with close to 100 people attending on average. Spanish and Chinese interpretation were provided at all the workshops.

For more information on the Family Wealth Forum, please visit www.sfassessor.org/familywealthforum.

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FAMILY WEALTH FORUM

2018 Event Report Card

Office of Assessor Carmen Chu
Saturday, March 24, 2018
10:00 am - 1:00 pm
Lincoln High School

300

attendees from all
across the city



*"I came with questions
and I am leaving with
answers and advice
my family can use."*

One-on-one counseling



133

families served by
26 financial experts

Trilingual workshops



Workshop attendance

- Estate Planning 101: **125**
- Keys to Homeownership: **75**
- Property Tax Savings for Families: **88**

Appointments by language



23%

languages other
than English

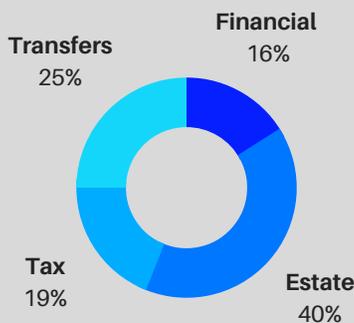
Appointments by age



77%

50 and older

Expertise requested



*"The Family Wealth
Forum has given me
ideas to help my family
on our path to more
secure housing."*