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*** 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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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

Appointments by language

23% languages other than English

Appointments by age

77% 50 and older

Expertise requested

- Transfers 25%
- Financial 16%
- Tax 19%
- Estate 40%

Trilingual workshops

Workshop attendance

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

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