



Survivor Outreach Services

Dine and Dial Wed 1/15/2025 7 PM Central. Financial Educational Call for Military Survivors

The Call number is **(1-605-475-5910; Access Code 7681905#)**

These programs originated out of the Ft. Leonard Wood Survivor Outreach Office to inform military survivors of potential resources. The Jan 15, 2025, call will be dialog on Financial, Tax and Estate planning considerations, especially for Military Spouses and their families, for addressing the various milestones Military Survivors face in terms of accessing benefits and potential resources for the family. It will include an updated review of the resources available for assistance in retirement and legacy planning, financial and estate planning, and have an emphasis on income tax preparation and estimated withholding considerations for 2025, events available for Military Survivor families, "Community Partnerships" including those offering weekend and other experiences in 2025. It will also have information needed for preparing the FAFSA form for 2025/26 (which includes Summer 2026,) state scholarship and property tax abatement deadlines and will have a follow-up dialog on specific potential education scholarship resources and timelines to apply for assistance K-PhD, including programs and initiatives of various (501(c)3 groups regarding the upcoming 2025/26 school years. The follow-up calls, tentatively, April 16, 2025, and tentatively July 16, 2025, will further discuss potential resources for proactive tax planning, milestones, and review more of the potential grants/ scholarships, and Preserving the Legacy planning concepts, (which some Military Survivor parents may appreciate) as we continue with some of the dialogs/themes of the prior calls.

Who: Military Survivors and friends are invited to dial into the next Financial "Dine and Dial" call and have access to some of the popular past calls that were recorded.

What: These calls, held at least quarterly, provide a forum for Military Survivors and friends to ask questions on education tools and to better understand techniques for identity theft minimization, saving and investing, estate planning considerations, tax issues, insurance, potential financial resources, and budgeting concerns in creating financial success and hear from various guest presenters and other peers.

Where: The Call number is **(1-605-475-5910; Access Code 7681905#)**; the call originates from Ft. Leonard Wood Survivor Outreach Services. **(*6 mutes or unmutes the call)** and is a joint venture between the financial counselors from the Ft. Leonard Wood SOS program, and other locations.

When: The next live call is Wednesday, Jan 15, 2025, 7:00 pm Central

Why: Many Survivors have asked for assistance in navigating potential resources, including how to better grasp potential projected positive cash flow opportunities and estate planning techniques, milestones, and scholarship programs.

Many of the past recordings of the Dine and Dial series recordings and related handouts are available upon request:

Mark Dunlop, CFP, ChFC, AFC, AEP, CEBS, MSFS, MSM
Survivor Outreach Financial Counselor, Fort Leonard Wood
573-596-0153; mark.j.dunlop2.civ@army.mil

(Note: Some of the specifics will be based on Missouri/Illinois/Wisconsin /Michigan/Kansas/Iowa, Nebraska issues as this conference call originates from the Garrison of Ft. Leonard Wood, Missouri, but the concepts are non-state specific. Special thanks go to the various Survivor Outreach Services Financial Counselors who help collaborate in the content for the calls and planning for these comprehensive events.) These quarterly update calls are usually scheduled for the third Wednesday of every third month with the same start time of 7 PM Central and same dial in number and password. The calls focus on relevant financial considerations for Military Survivors and those who support them. **DISCLAIMER:** It is the mission of the Army Survivor Outreach Program to provide Survivors with information on resources available to them. Neither the Army nor any other part of the Federal Government officially endorses or warrants, either expressly or impliedly, any company, sponsor, or their products or services.