CE SEMINARS

COUZENS, LANSKY, FEALK, ELLIS,
ROEDER & LAZAR, P.C.
Country Club Office Centre
39395 West Twelve Mile Road, Suite 200
Farmington Hills, Michigan 48331
248-489-8600
www.couzens.com
info@couzens.com

We have been offering continuing education courses for over 30 years. These courses not only discuss substantive material but provide very practical ideas for financial advisors.

COURSE NAME	CREDITS	CHECK IF INTERESTED
Questions Every Client Needs to Answer	1	☐

This is the most popular course to motivate clients into action to address their estate and business planning. Participants will find this course pertinent, insightful and timely to their work.

Estate Planning

These courses cover Wills, Trusts, Living Wills, Patient Advocate Designations, Powers of Attorney, trust funding and avoiding Probate, as well as more advanced estate planning strategies such as gifting techniques, generation skipping, disclaimers, Domestic Asset Protection Trusts, sales to Defective Irrevocable Trusts, Grantor Retained Annuity Trusts and Charitable Giving.

Common Mistakes in Estate Planning	1	☐
Estate Planning Strategies	2	☐

IRAs and Retirement Plans

This course addresses the pros and cons of designating a spouse or children as direct beneficiaries. Should a Trust be designated as the beneficiary? Charity?

Required Minimum Distribution Rules	1	☐

Life Insurance

This course focuses specifically on using life insurance in estate planning, buy sell planning and charitable giving. Irrevocable Trusts are covered. Split dollar arrangements are also addressed.

Creative Uses of Life Insurance	2	☐

COURSE NAME	CREDITS	CHECK IF INTERESTED

Estate Administration

This course addresses the steps necessary to administer an estate. Topics include filing the estate tax return, processing a probate matter, distributions to beneficiaries and income and estate tax elections.

How to Administer an Estate	1	☐

Buy Sell Agreements

Succession planning is an important strategy for every business owner. This course covers buy sell agreements, as well as other business transfer techniques, especially in a family business context.

Buy Sell Agreements	1	☐

Medicaid Planning Techniques	2	☐

This seminar covers the rules to qualify for Medicaid and the techniques used to meet the requirements. This area of law has become increasingly important to the public.

Ethics	3	☐

This course deals with the practical potential conflict of interest issues that confront professional financial advisors when they represent the husband and wife in an estate planning case or multiple owners of a closely held business. Who is your client? Husband? Wife? Majority or minority owner?

Ask us about our effective Client Appreciation Seminars		☐

☐ Contact me about a topic or client matter ☐ Contact me about your seminars

Name: ______________________________

Address: ______________________________

Telephone (Office):______________________ (Cell): ______________________

Email: ______________________________